

# APPENDIX B: INSTALLATION AND SETUP

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# APPENDIX B: INSTALLATION AND SETUP

## A. Overview

### 1. *How do I install and setup ICMS?*

There are several steps in the initial installation and setup of **ICMS**. Look over the list of tasks below to get an idea of what you'll be doing. This appendix contains step-by-step directions for completing each of the tasks.

**IMPORTANT: If you are currently using ANCS+ 8.0, you will simply upgrade your existing system to ICMS. See Section I below to run the upgrade to ICMS. Do not install ICMS separately (unless you are moving the program and your data to a new computer).**

Complete the tasks in order. Your **ICMS** program will then be ready for use as a complete museum collection management system. To install and setup **ICMS**:

- Gain a general understanding of **ICMS**.
- Assemble the items you'll need to complete the installation and setup.
- Install the program on your computer or server.
- Configure network connections if installing on a server.
- Configure file permissions on your computer or server.
- Install workstations on local machines for network installations.
- Create new directories for entering collections data. (See Section IV of Chapter 9 for creating new directories.)
- Add users to your system and establish their security rights. (See Section VI of Chapter 9 for adding users.)
- Create a NPS Unit or DOI Unit record in the Names and Addresses associated module. (Refer to Section XII of Chapter 4.)

*You may call Re:discovery Software, Inc. for help at anytime before or during the installation process. Their main telephone number is 434-975-3256. Their main fax number is 434-975-3935. Refer to Appendix K: Support for more information about support.*

### 2. *Do I need special security rights to install ICMS?*

Yes. You must have administrator rights on your computer or server to install new programs. If you do not have administrator rights, contact your IT staff member for assistance.

### 3. *Installation Basics*

Your computer must meet the minimum hardware requirements defined in Appendix A. It needs enough free disk space to install the new version.

Most installations of **ICMS 8.10** will use Microsoft SQL Server 2005 Express Edition as the database engine, provided on the **ICMS** disk. Large

network installations will use SQL Server 2005 Standard Edition, either available via a service-wide license or purchased separately. If you will be using the SQL Server 2005 Standard Edition, you must install it first before installing **ICMS**. Installation of the **ICMS** program takes about 10-15 minutes. Follow the instructions in Section B below.

4. *How do I get a quick overview of **ICMS**?*  
Read the introduction to this manual. It will provide you with a general understanding of **ICMS** and may answer some of your preliminary questions.
5. *What do I do if I'm unsure that my system meets the requirements?*  
Make a list of all your system's components and configuration, as listed in Appendix A. You may need to ask the person who provides computer support at your unit to help you. Call Re:discovery Software, Inc. and tell them why you think your system might not meet the requirements. Have the list you made handy so you can answer the technical representative's questions regarding your system. The technical representative can tell you if you can load the program on your current system.

## B. Installing ICMS 8.10

***These instructions are for an initial installation of ICMS 8.10 only. Do not use these instructions if you are currently using ANCS+ 8.0. If you are moving the ICMS program to a new computer, see Chapter 9, Section III.***

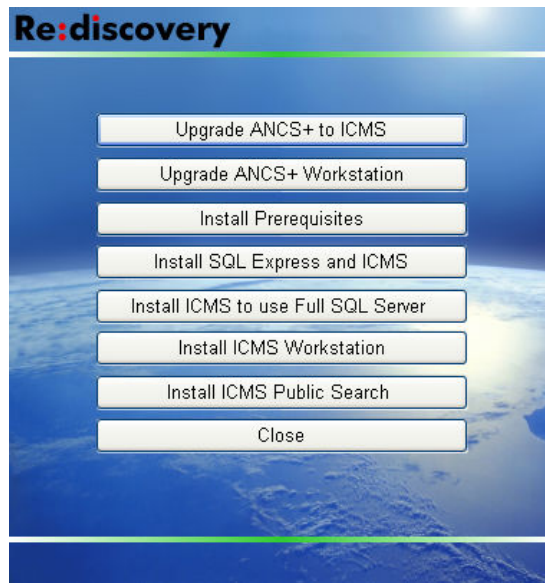
**Note:** You must have administrator rights on your computer to install new software. If your login account does not have rights to install new software, please contact your IT staff member for assistance.

Please make sure that you read the System Requirements before installing the software and that the system complies with the minimum requirements.

1. *How do I install **ICMS 8.10**?*  
Installing **ICMS 8.10** is a multi-step process depending on your setup choice. You will install the following programs from the installation CD:
  - Installing Prerequisites (required for all installations) (Section C)
  - Installing ICMS 8.10 (choose from the following options)
    - Option 1: Install SQL Express and ICMS (Section D)
    - Option 2: Install ICMS to use Full SQL Server (Section E)
  - Network Configuration for Network Installations (for Option 1 or Option 2) (Section F)
  - Installing ICMS Workstations on local machines for network installations using Option 1 or Option 2 (Section G).  
**Note:** A workstation will automatically be installed for both installation options on the main computer.

To begin:

Insert the ICMS DVD in your CD/DVD drive. The installation menu will open



**Note:** *If the installation menu does not open automatically, use My Computer or Windows Explorer to navigate to your CD/DVD drive. Double-click the file “autorun.exe.”*

2. Which sections do I complete for installing on a standalone computer?

To install on a standalone computer using the SQL Server Express, complete these sections below:

- C. Installing Prerequisites
- D. Installing SQL Server Express and ICMS  
(Installs: SQL Server Express, ICMS Server Components and a workstation)

**Note:** A workstation will automatically be installed for all installation options on the standalone machine or server.

3. Which sections do I complete for installing on a network?

To install on a network system, complete these sections below:

- C. Installing Prerequisites

Option 1:

- D. Installing SQL Server Express and ICMS  
(Installs: SQL Server Express, ICMS Server Components and a workstation)

**OR**

Option 2:

- E. Installing ICMS to use SQL Server 2005 Standard Edition  
(Installs: ICMS Server Components and a workstation)
- F. Network Configuration for Network Installations (required for both Option 1 or Option 2 – Sections D or E)
- G. Installing ICMS Workstations on other (required for both Option 1 or Option 2 – Sections D or E)

**Note:** A workstation will automatically be installed during the main ICMS installation for both options above. Follow the instructions in Section G to

install workstations on local machines that will connect to the server installation.

4. *What is the difference between Option 1 and Option 2 for installing ICMS 8.10?*

**Option 1:** Use this option if you will be installing the program on a standalone machine or small network (2-5 concurrent users) and do not have SQL Server 2005 Standard Edition installed. This option includes the installation for SQL Server 2005 Express Edition.

**Option 2:** Use this option to install the ICMS components to your already installed SQL Server 2005 Standard Edition instance for a large network setup (6+ concurrent users). If you use this option, you also **must** install the Workstation component in Section G for the client portion on the workstations.

**NPS Note:** If you do not have SQL Server 2005 Standard Edition already installed, **the NPS has a service-wide license for SQL Server 2005 Standard Edition** that you can install separately and prior to the installation of **ICMS 8.10**. SQL Server 2005 Standard Edition is available from the Regional IT Specialist. The download site requires a password for use.

5. *Which installation option should I use?*

If you do not have any staff members or computer support staff who are familiar with SQL Server 2005 Standard Edition and you will have less than 5 concurrent users of the program, install Option 1 – the SQL Server 2005 Express Edition. This requires the least amount of setup.

If, however, you already have SQL Server 2005 Standard Edition or higher installed and/or you have computer support staff who can use and configure SQL server, install Option 2 – SQL Server 2005 Standard Edition Components Installation. This installation is recommended for units who have large networks or 6+ concurrent users of the program.

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## C. Installing Prerequisites

1. *How do I install the prerequisites for ICMS 8.10?*

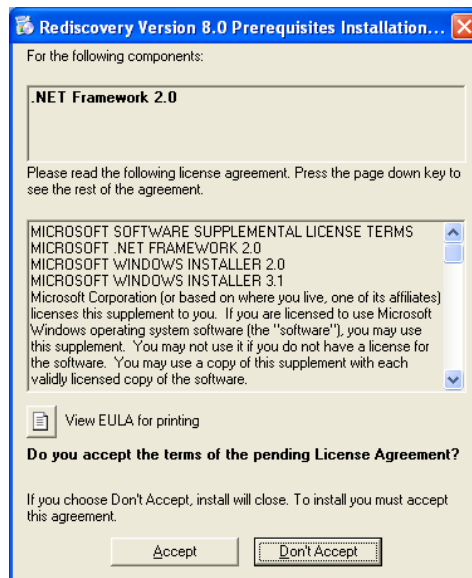
The ICMS Prerequisites are required for all installations (standalone, server and workstation). Follow these steps to install the prerequisites:

- On the installation menu, click the **Install Prerequisites** button.

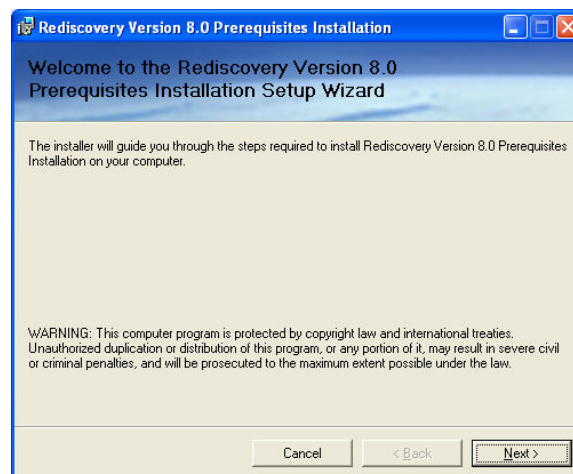
**Note:** If your computer is older and does not have the current versions of Internet Explorer, MDAC, Windows Installer or Windows Script, you must install these separately. They are available on the ICMS installation DVD in the Proficio Prerequisites folder. Most computers will not need this step. The installation will indicate if you need to install one of these before you can continue. Open the necessary folder and run the application file inside it to install these components. You may need to reboot your computer after installing these. Then proceed with the following instructions to install the prerequisites for Rediscovery Version 8.0

- Follow the on-screen instructions.

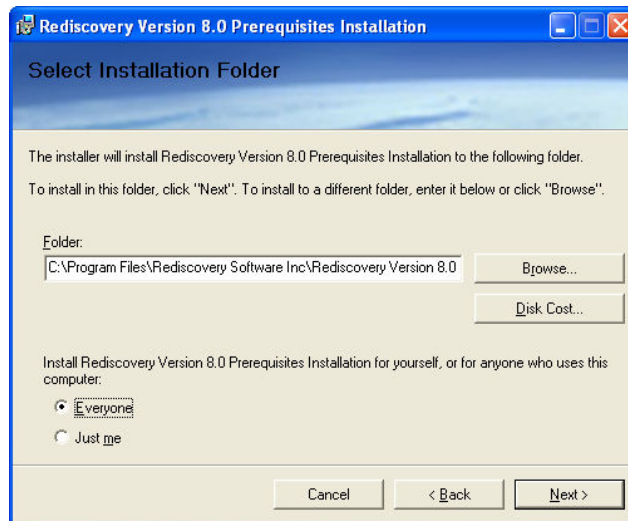
**Note:** One of the prerequisites being installed is Microsoft .Net framework 2.0. If Microsoft .Net Framework 2.0 is not installed on your machine already, the following license agreement will appear for you to install the .Net Framework. If it is installed already, you will begin with the Prerequisites Installation screen instead (see below).



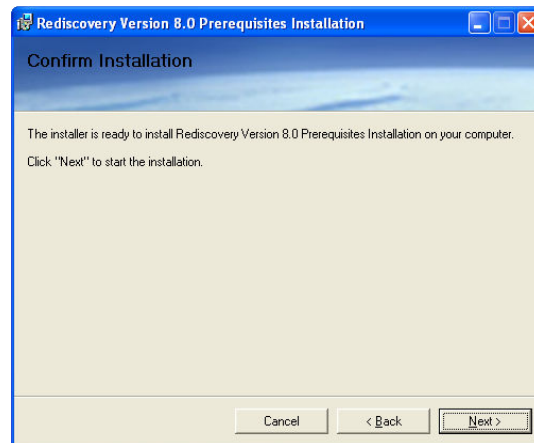
- Click Accept on the license agreement to install the .NET Framework 2.0. The .Net Framework will install.



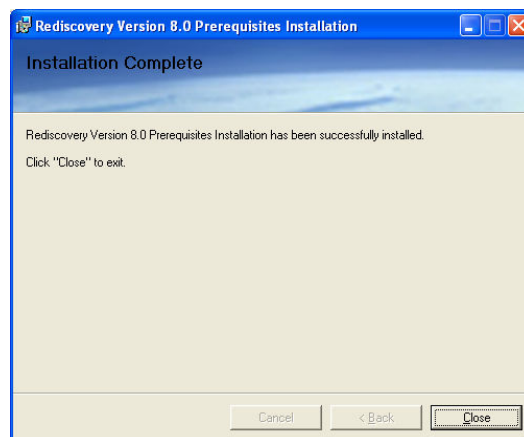
- Click Next to install the prerequisites.



- Accept the default folder location or enter a new location where you want the program installed. Select Everyone at the bottom left, and then click Next.



- Click Next to confirm and start the installation of the prerequisites. You will see a progress window while the installation is working.



- When the installation is complete, click Close.



## D. Installing SQL Server Express and ICMS (Option 1)

### 1. *What is the Option 1 installation for ICMS?*

Use Option 1 to install the program on a single computer or small network (2-5 concurrent users) and if you do not have SQL Server 2005 Standard Edition installed. This will install **ICMS** server components along with SQL Server 2005 Express Edition and a workstation.

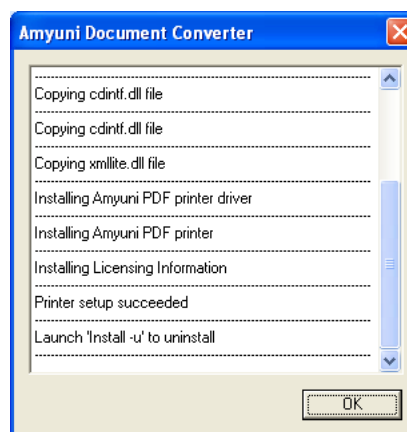
**Note:** For large network installations (6+ concurrent users), we recommend that you use Option 2 and SQL Server 2005 Standard Edition instead.

**64-BIT COMPUTERS & ALTERNATE SQL PASSWORDS**  
If you are installing ICMS and SQL Express from the March 2009 installation disk on a 64-bit computer or your network security policy has been updated to require more complex passwords, you will have to install SQL Express separately and then use Option 2 in Section E below. You will not be able to install the program using Option 1. See Section J below to install SQL Express separately.

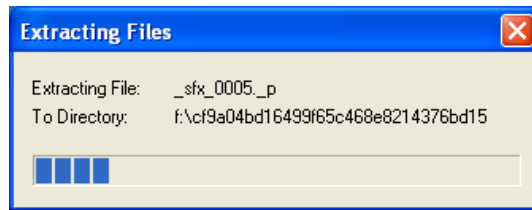
### 2. *How do I install SQL Server Express and ICMS -- Option 1?*

To install Option 1 – the SQL Server Express and ICMS installation, follow these steps:

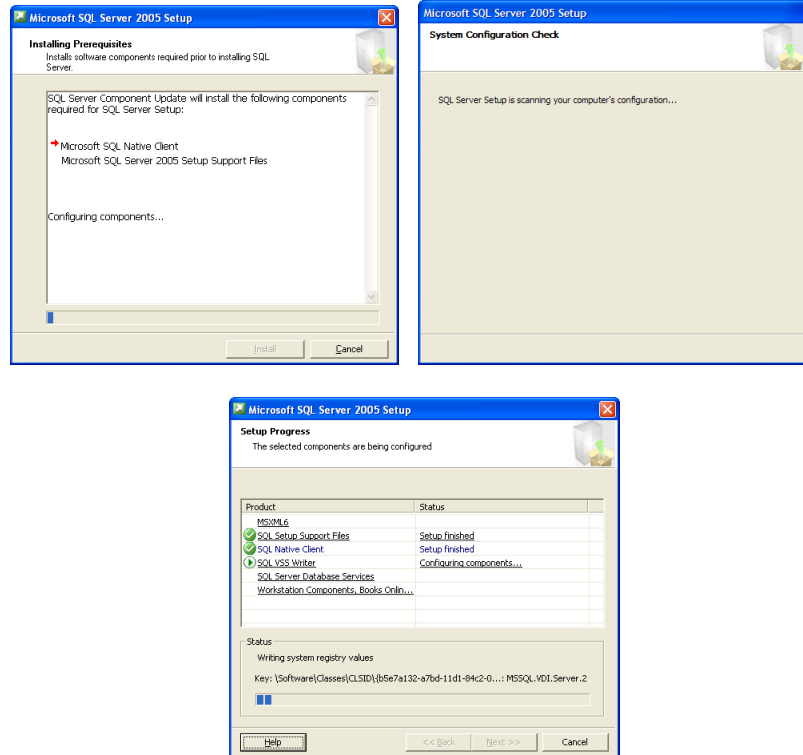
- First, make sure that you have installed the prerequisites in section C above.
- On the installation menu, click the **Install SQL Express and ICMS** button.
- The Amyuni Document Converter window opens. Click OK.



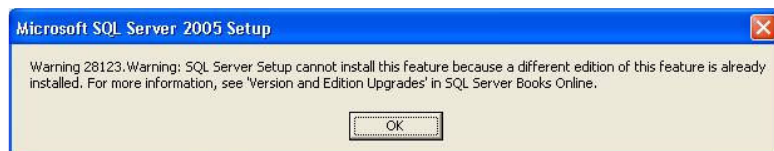
- Wait while the installation scans your computer and installs SQL Server 2005 components (SQL Express) and a named instance. Please be patient; this may take several minutes to complete. You will see the following screens as it proceeds. Each will complete and continue automatically.



## SQL Server Express Installation



**Note:** If you are installing Rediscovery Version 8.0 on a computer that has other SQL servers, applications, or tools, you may get the following message during the Microsoft SQL Server 2005 Setup portion of the installation.



Just click OK and the installation will continue. It will not affect the installation or operation of ICMS.

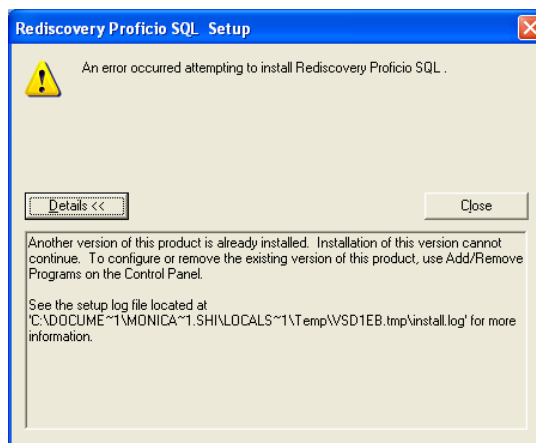
## ICMS Installation

- The “Welcome” window opens for Rediscovery Proficio SQL (ICMS) setup automatically after the SQL Server 2005 Express installation finishes.

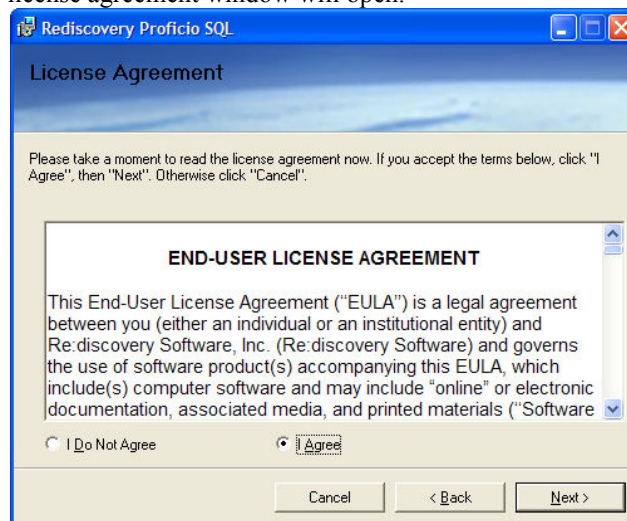


- Click Next to continue.

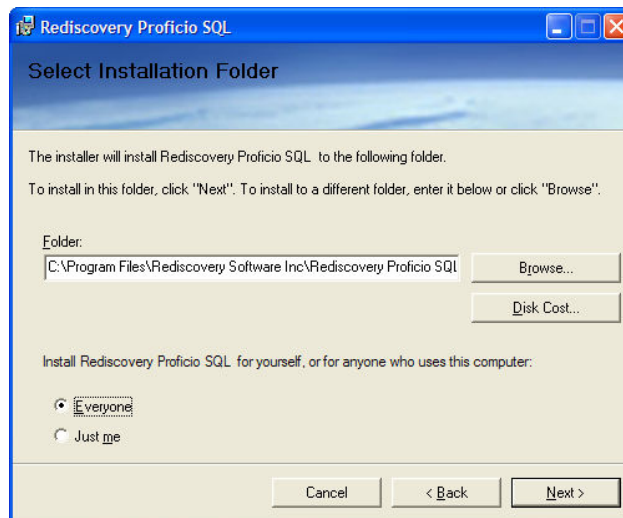
**Note:** If at this point you receive the following error message, instead of the Welcome window above, then you already have ANCS+ 8.0 installed on this computer. Contact Re:discovery technical support to assist you with removing ICMS, and follow the “ANCS+ to ICMS Upgrade” instructions in Section I below.



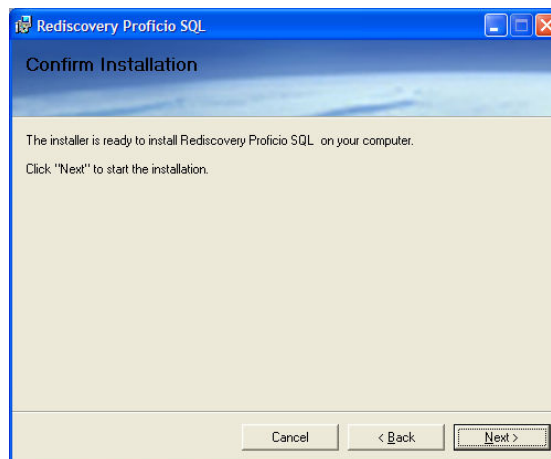
- The license agreement window will open.



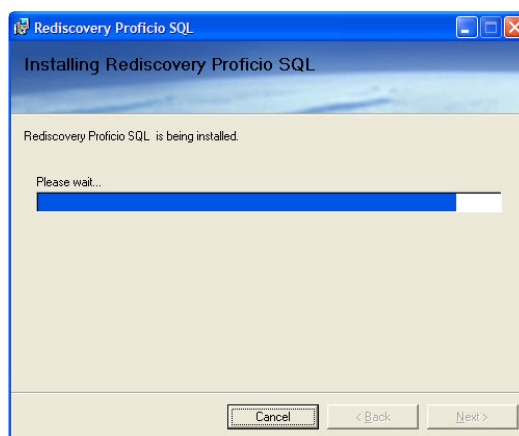
- Review the End-User License Agreement. Select “I Agree” and click Next.



- ICMS will install to the C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL\ folder. (**Note:** You will use this same path when installing the workstation below.) Select “Everyone” and click Next.



- Click Next to start the installation. You will see an installation screen showing the installation progress.



- Provide the path that workstations will use to reference this installation. A “workstation” is the end-user interface for accessing ICMS, whether on a standalone, shared computer, or network server installation. Edit this path to match your setup as follows:

**For standalone installations:** Change this path to:

**C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL\**

or the path you indicated above for where to install ICMS.

**For shared computer or server installations:** You must first establish the share on the folder where the program is installed. We recommend sharing the Rediscovery Software Inc folder, but you may choose another share above this level if necessary. See section B.5 below for information on how to set up a share. Then edit this path as needed for the proper UNC reference. (A UNC path refers to the server name rather than a drive letter and includes the share name). For example:

If you shared the Rediscovery Software Inc folder:

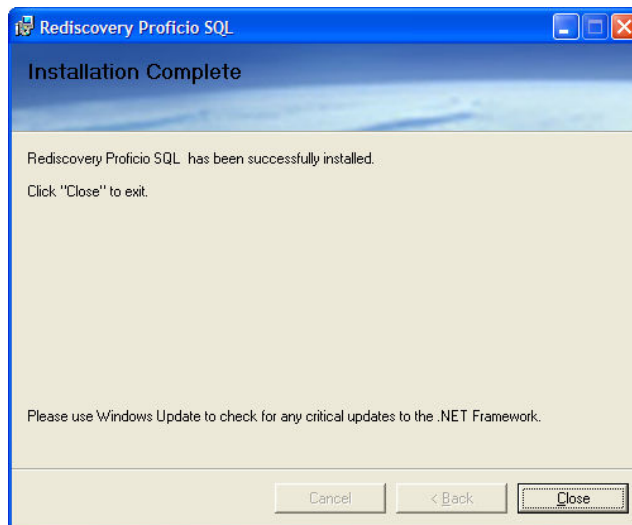
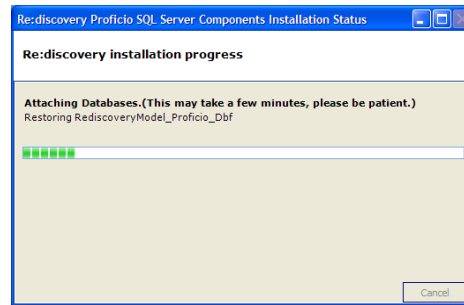
**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**

If you shared a folder above Rediscovery Software Inc:

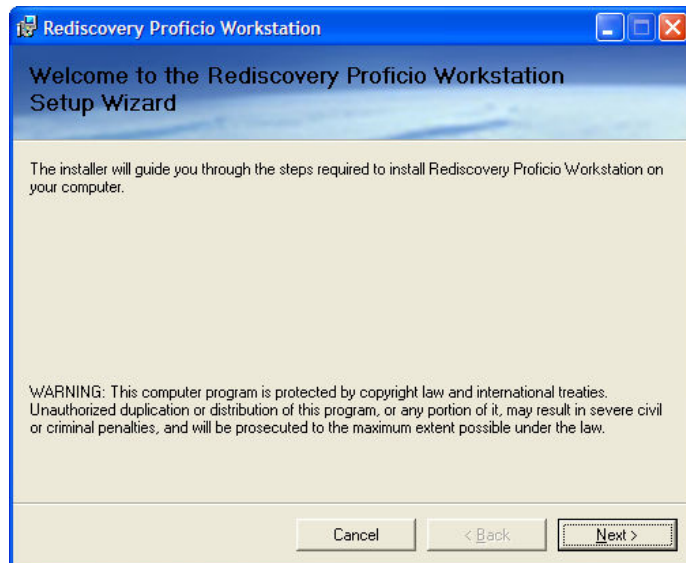
**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

After filling in the path, click Install.

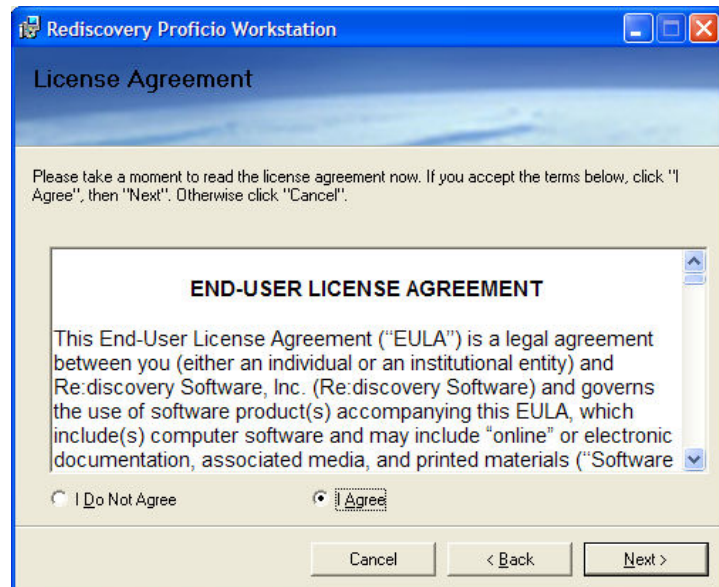
- Please be patient while the ICMS Server Components install. This process can take 3-10 minutes depending on the speed of your computer and may appear to stop. Please be patient and it will complete.



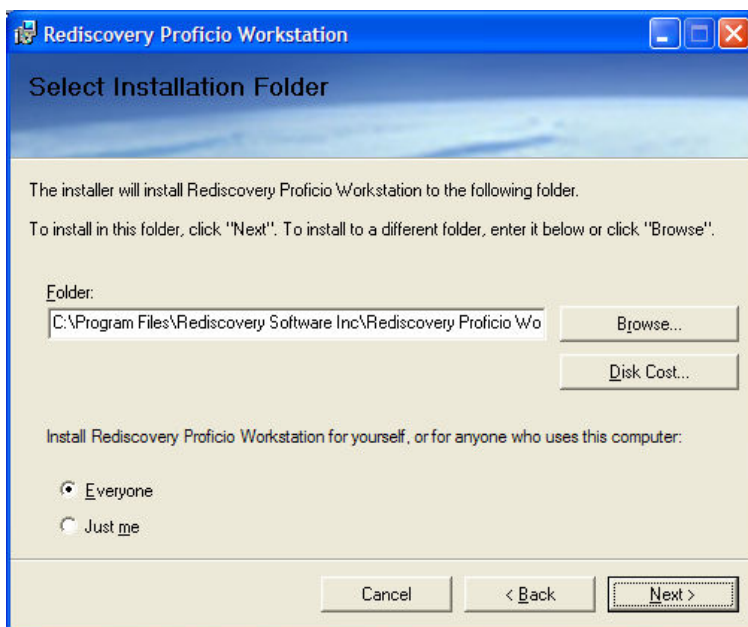
- When the installation is complete, click Close.
- The “Welcome” window for the Workstation setup will open next. A “workstation” is the end-user interface for accessing ICMS, whether on a standalone, shared computer, or network server installation and is required to run the program.



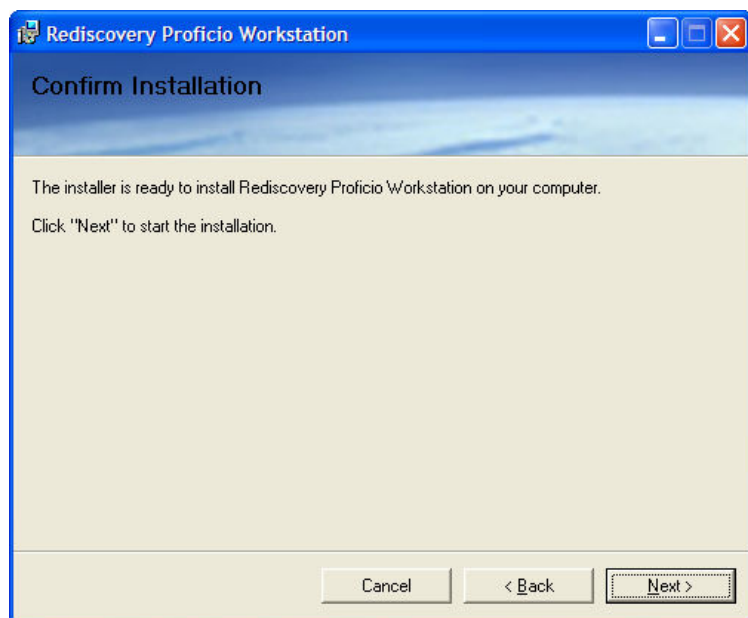
- Click Next to continue.



- Review the End-User license Agreement. Select “I Agree” and click Next.

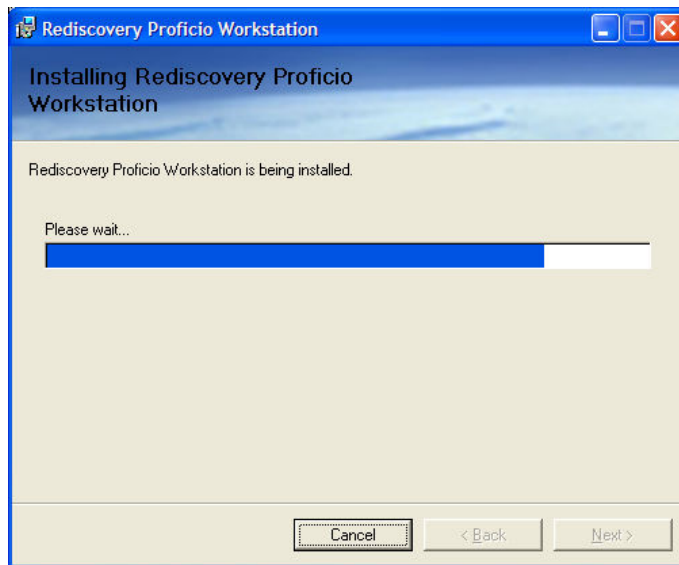


- The workstation component will install to the folder C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same root path here as you did when installing the main ICMS components above (page B:10), leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select "Everyone," then click Next.

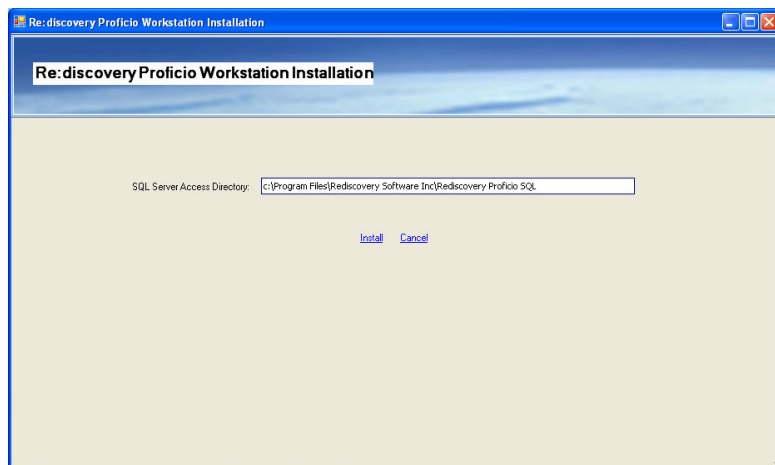


- To confirm the installation, click Next.





- The installation will proceed.
- In the next window, indicate the SQL Server Access Directory. Enter the same path you used on page B:11 above when indicating how the workstation will reference the server installation.



**For standalone installations:**

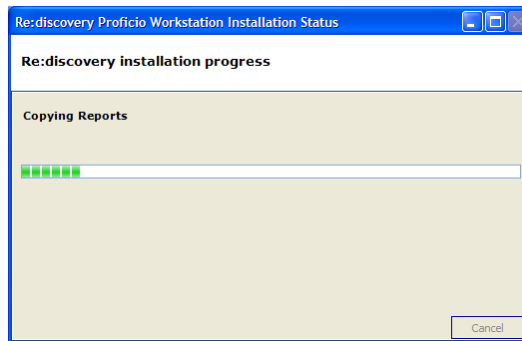
**C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL**

or the path you used on page B:11 above.

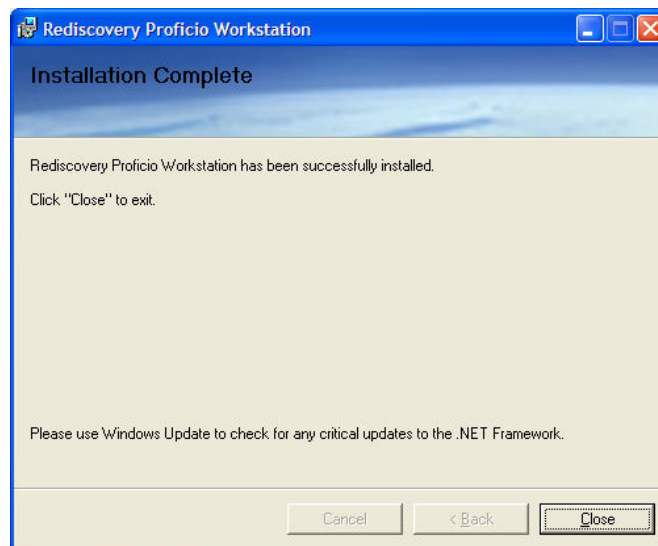
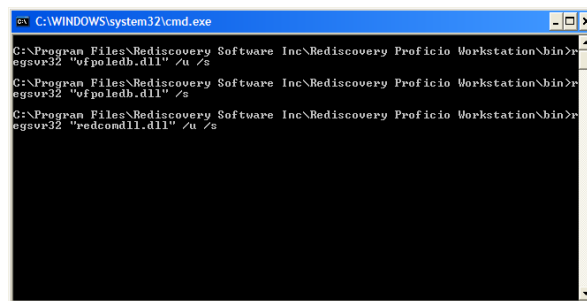
**For server installations:** use the UNC path you entered on page B:11 above. For example:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**  
**\\ServerName\sharename\Rediscovery Software inc\Rediscovery Proficio SQL\**

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



- A DOS window will appear briefly just before completion.



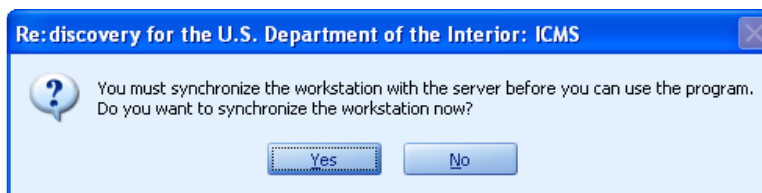
- When the installation is complete, click Close.
- Your installation is complete. Click Close on the installation menu.

If you are installing ICMS on a standalone computer, you are finished!

Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button, under All Programs. Start the program to test the installation. The default login is the User ID **red** and the password **red**. This is an Administrator level login.

**Note:** When you start the program for the first time, it may ask to

Synchronize with the server. Click Yes.



3. *What File Permissions must be established on the program folder?*

You must now set File Permissions through Windows Explorer. The three basic Re:discovery user profiles that will need certain permissions established to run the program are:

- Public Search – users with only Public Search or Researcher rights for read-only access to the data.
- Data Entry – general users with Data Entry rights, without access to the administrative functions within Re:discovery.
- ICMS Administrator – power users with full access to all functions including creating new directories and backup functions.

The following chart lists the folder and subfolders with the permissions required depending on the user's or group's security profile within the program. These folders are located in C:\Program Files\Rediscovery Software Inc\ or the location you entered on page B:10 above.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator**
Rediscovery Proficio SQL			Full
Bin	R	R	Full
Data		R	Full
Docs	R	R	Full
Dictionaries		R	Full
FullImages		RWD	Full
Query Express		R	Full
RediscoveryForInternet	R	R	Full
Sweep		R	Full
Thumbnails		RWD	Full
Updater		RWD	Full
Upgrade		R	Full
VisualRediscovery		RWD	Full
WorkstationInstall			Full
Connection.config file	R	R	Full
Rediscovery Proficio Workstation	R	RWD	Full
Bin	R	RWD	Full
Dictionaries	R	R	Full
Docs	R	R	Full
Query Express		R	Full
RediscoveryForInternet	R	R	Full
Synchronizer	Full	Full	Full
Upgrade		R	Full
VisualRediscovery	R	RWD	Full

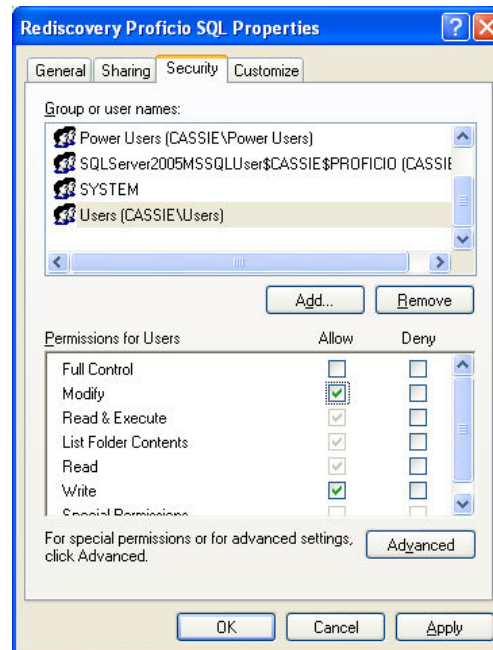
R = Read & Execute + List Folder Contents + Read, W = Write, D = Delete

\*\* ICMS Administrators require full permissions on the Rediscovery Proficio SQL folder to create and delete subfolders when they create new directories and perform data backups or transfers to disk.

4. *How do I set up file permissions?*

To set up file permissions:

- Open Windows Explorer and navigate to the C:\program files\Rediscovery Software Inc\Rediscovery Proficio SQL folder.
- Right click on the folder and choose Sharing and Security.
- Select the Security tab.



- You can either add different groups to the list if you have users separated into groups, or select the Users group from the list.
- Use the chart above to define Permissions for each user profile. If you are only using the Users group, you should check the Modify and Write permissions. Read & Execute, List Folder Contents, and Read are usually automatically selected when a new program is installed. You can apply these permissions to the entire Rediscovery Proficio SQL folder, or, if you prefer, select the individual subfolders and apply permissions as shown in the chart above.
- Click Apply, then OK to save the File Permissions.
- Follow these same steps on the C:\program files\Rediscovery Software Inc\Rediscovery Proficio Workstation folder.

***If this is an installation for a small network (even if only 1 additional workstation will connect to this installation), proceed to Section F for the network configuration and Section G to install additional client workstations.***

## E. Installing ICMS to use SQL Server 2005 Standard Edition (Option 2)

### 1. *What is the Option 2 installation for ICMS?*

This option is for use with SQL Server 2005 Standard Edition. This version of SQL is not provided on the installation disk. Your bureau or office may already have a site license for SQL Server.

You must first install SQL Server 2005 Standard Edition using the instructions provided with the software. To install a new instance, you must use the SQL installation CD as well. Then follow these configuration instructions for the security login prior to installing the ICMS components.

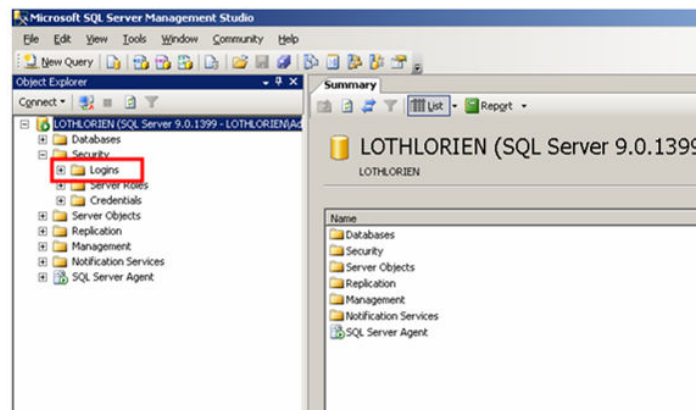
**Note:** If you installed SQL Server 2005 Express separately for a 64-bit computer or alternate SQL password requirement, then you must use these instructions to complete the installation of **ICMS**.

### 2. *What do I need to do to configure my SQL Server 2005 Standard Edition before installing ICMS?*

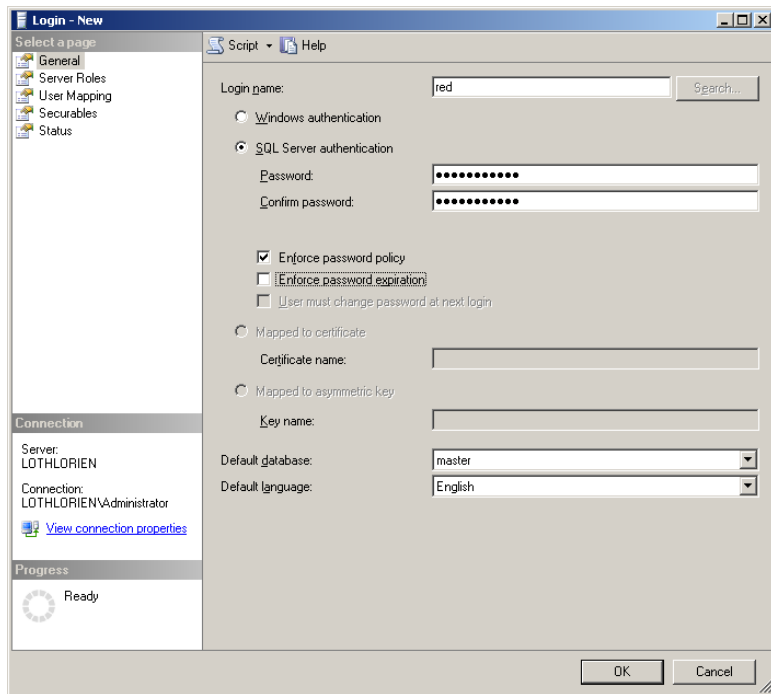
You must configure the SQL Server 2005 Standard Edition (or SQL Express) login and authentication mode before you can install **ICMS**. Follow these steps to configure the login and authentication mode:

- Open the SQL Server Management Studio window and select the Database Engine you will be using.

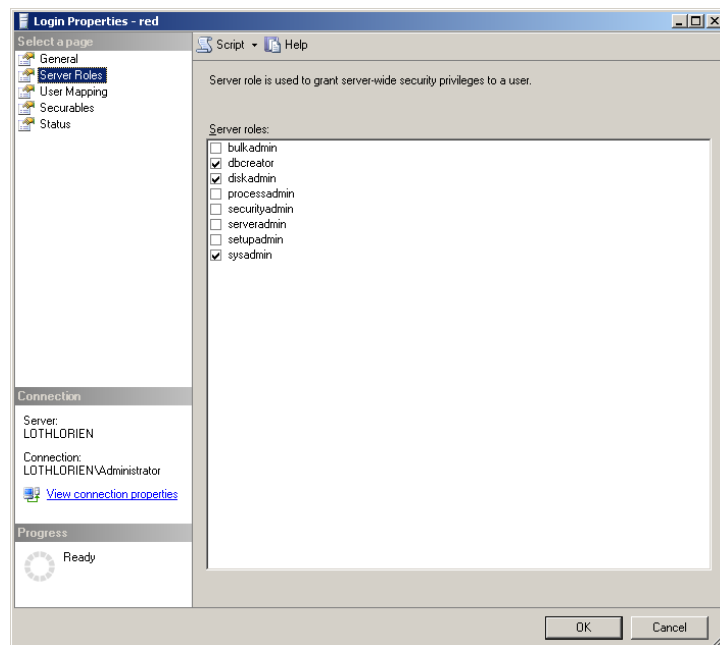
## Logins



- Under Security on the left, right click on Logins and select New Login. (Or you can use an existing login, if desired, as long as it is configured as follows.)



- Enter a Login name, you can use 'red' or other login name.
- Select SQL Server authentication. Enter a password and confirm the password.
- Select "Enforce password policy" and deselect "Enforce password expiration".
- Choose "master" for the Default Database.
- Default language should be English (or you can leave it as <default>).
- While still in the Login properties, select Server Roles for this login under 'Select a page' in the upper left.



- For Server Roles, check the following: **dbcreator**, **diskadmin**, and **sysadmin** as shown above.

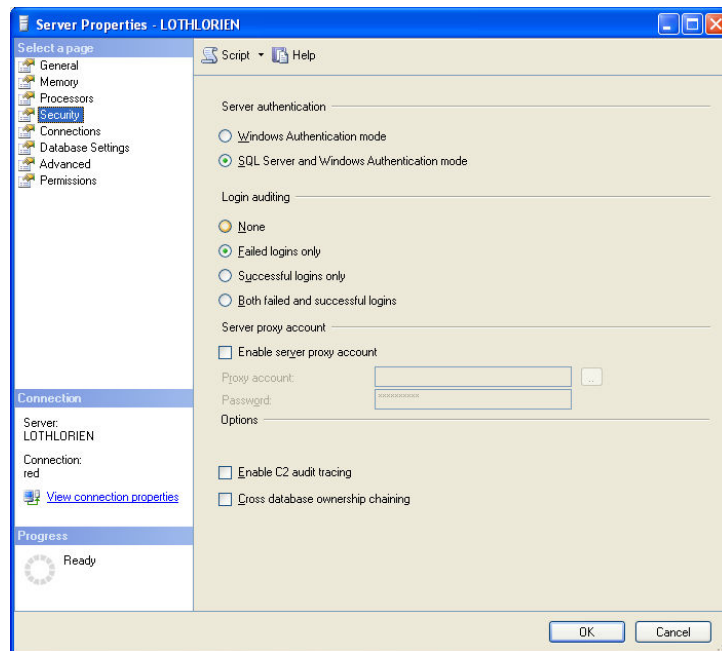
**Note:** Please make a note of the login and password you will be using as well as the name of the SQL Server instance. You will need this information when installing the **ICMS** components.

- Click OK to save the login.

### Authentication Mode

Set your SQL instance to use both SQL and Windows authentication:

- In the SQL Management Studio, right click on the Server\instance name in the left navigation pane and choose Properties.
- In the Properties window, choose Security under Select a page in the left pane.
- Under Server Authentication, make sure that “SQL Server and Windows Authentication mode” is selected.

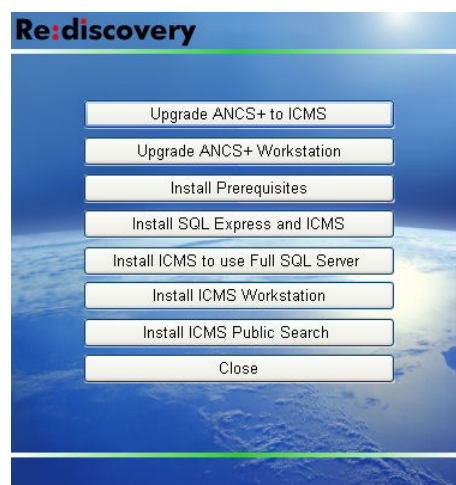


- Click OK to save any changes.

### 3. How do I install **ICMS** SQL Server components for use with SQL Server 2005 Standard Edition?

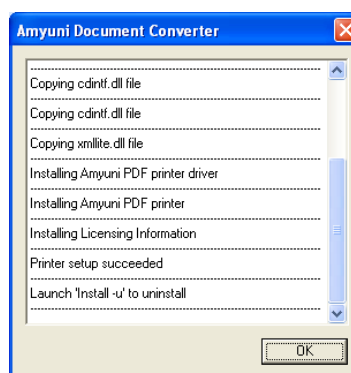
To install Option 2 – the ICMS SQL Server Components for SQL Server 2005 Standard Edition and an ICMS workstation, follow these steps:

- First, make sure that you have installed the prerequisites in section C above.
- On the installation menu, click the **Install ICMS to use Full SQL Server** button.

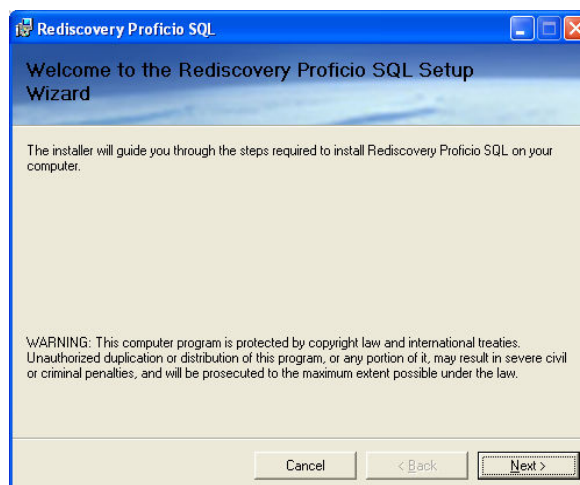


**Note:** If the installation menu does not open automatically when you insert the DVD, use My Computer or Windows Explorer to navigate to your CD/DVD drive. Double-click the file “autorun.exe.”

- The installation will begin with the Amyuni RTF Driver. Click OK when complete.

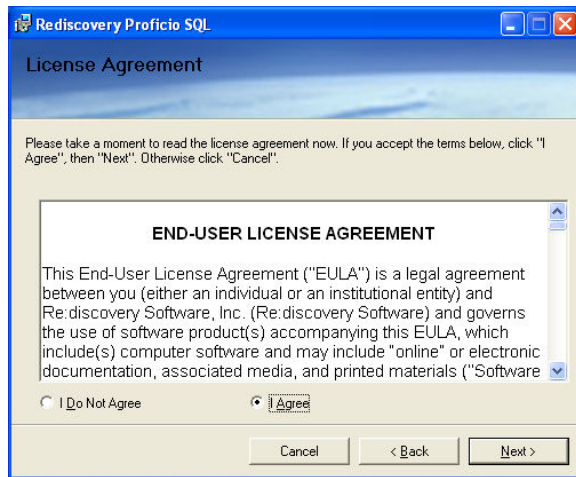


- Follow the instructions in the Rediscovery Proficio SQL setup wizard.

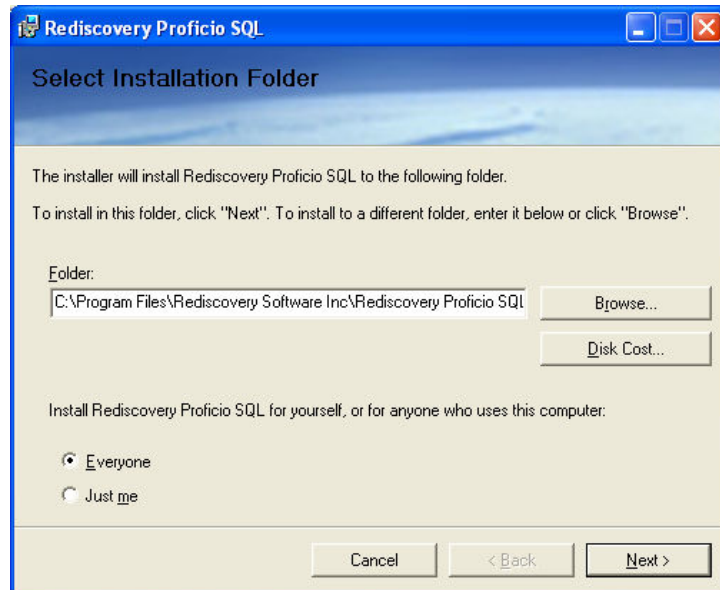


- Click Next to begin.

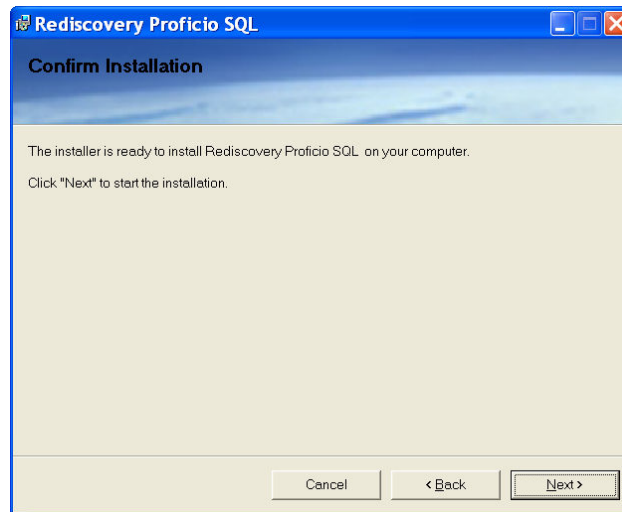




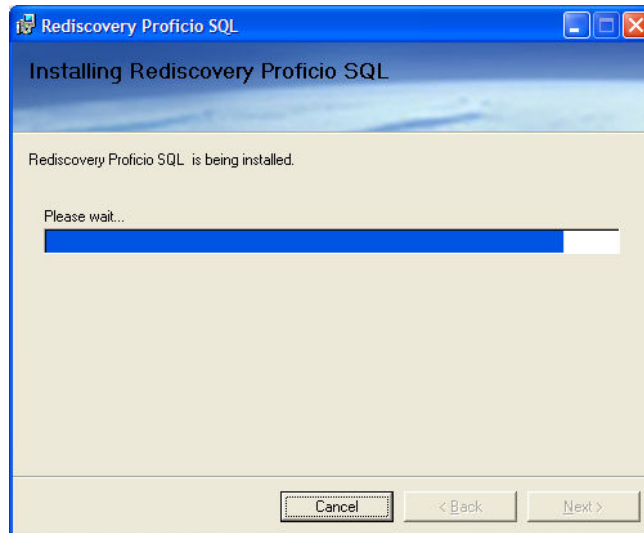
- Select “I Agree” on the License Agreement and click Next.



- The program will install to the “C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0 SQL” folder. Select Everyone, then click Next to start the installation.



- Click Next to confirm the installation.
- You'll see the installation proceed.



- You now need to provide the installation some information.

1. How will workstations reference this server installation?: The installation will fill in the network path to the system using the computer name to indicate how client workstations will refer to the installation directory. You must establish a shared folder on the server for workstations to access. (See F.5 below on how to share a folder.)

If you shared the Rediscovery Software Inc folder:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**

If you shared a folder above Rediscovery Software Inc:

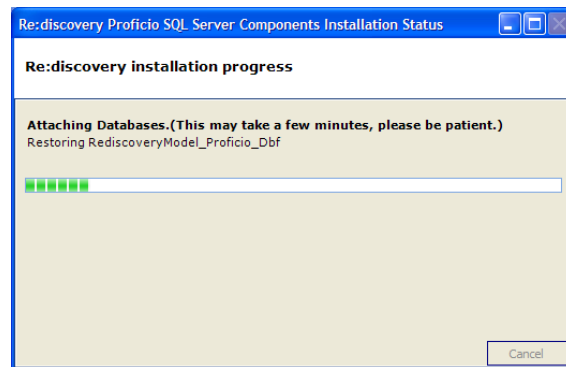
**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

(Do not change the folder names after the share name.)

**Note:** If this is a standalone installation, change this path to C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL\ or the drive path you indicated on page B:23 above.

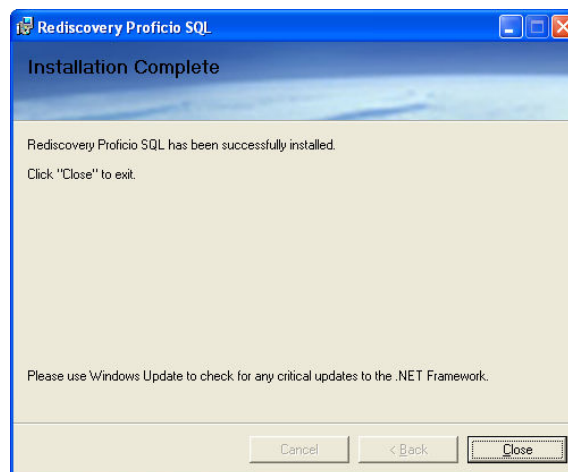
2. SQL Server Name: You must provide your SQL Server Name. If you are not using the SQL default instance, enter the ServerName\InstanceName. The installation will fill in automatically as ComputerName\Proficio. Edit as needed if your instance name is something other than Proficio.
  3. Where do you want to install your Proficio SQL Server files?: The program will install to the C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL folder. If you are installing to an alternate drive, enter the same path here as you did on page B:23 above.
  4. How does the SQL Server Computer reference this location?: This will automatically fill in with the path from the field above it when you tab through. If the server drive has a different reference when viewed from the server, enter the physical path as the server would see it. (Most installations will not need to change this path.)
  5. Proficio SQL Login ID and Proficio SQL Login Password: Enter the SQL Server Login ID and Password you created for this SQL Server instance in SQL Server Management Studio.
- After filling in these fields, click the Install link.

- Please wait while ICMS SQL Server Components install. This may take 2-10 minutes to complete depending on the speed of your computer and may appear to stop. Please be patient and it will complete.



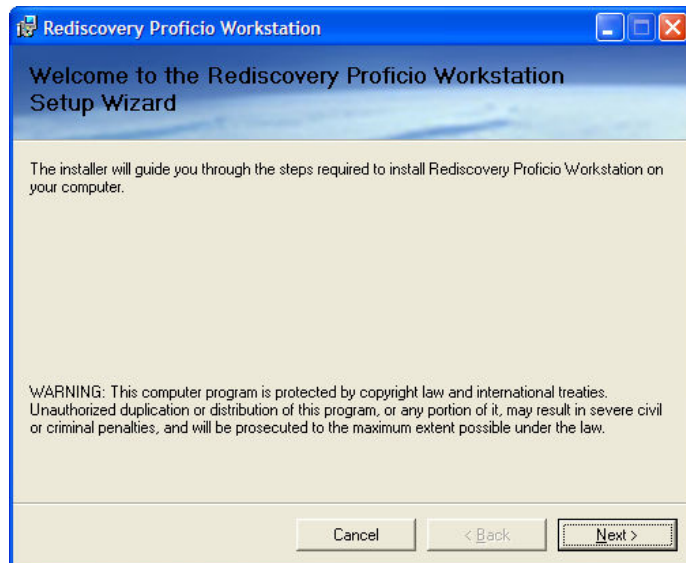
**Note:** If you receive an error message that the installation failed because it could not open a connection to the SQL Server, the SQL Server Name you supplied above is incorrect. Click OK, then Close the installation window.

Please check the name of your Database Engine instance in SQL Server Management Studio. Then start the installation again and choose Uninstall to remove the current installation. Once it is removed, start the installation again to reinstall the program and supply the correct SQL Server Name.

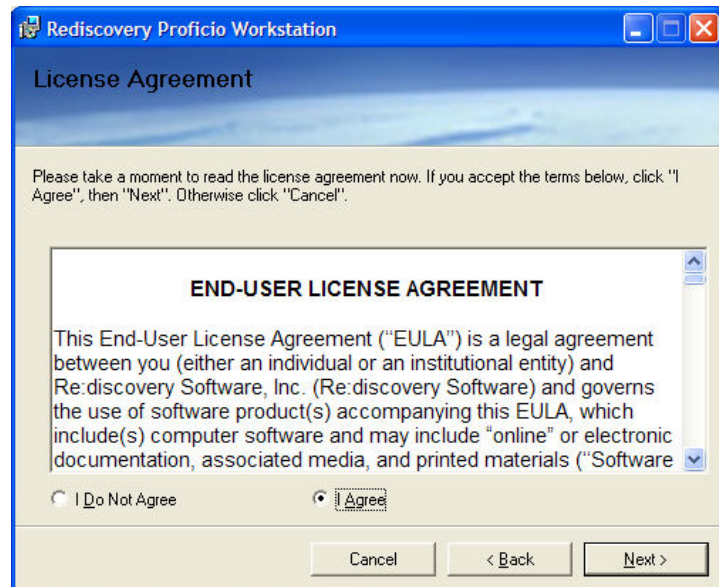


- Once the installation is complete, click Close.
- The installation will proceed by installing a **Workstation**.

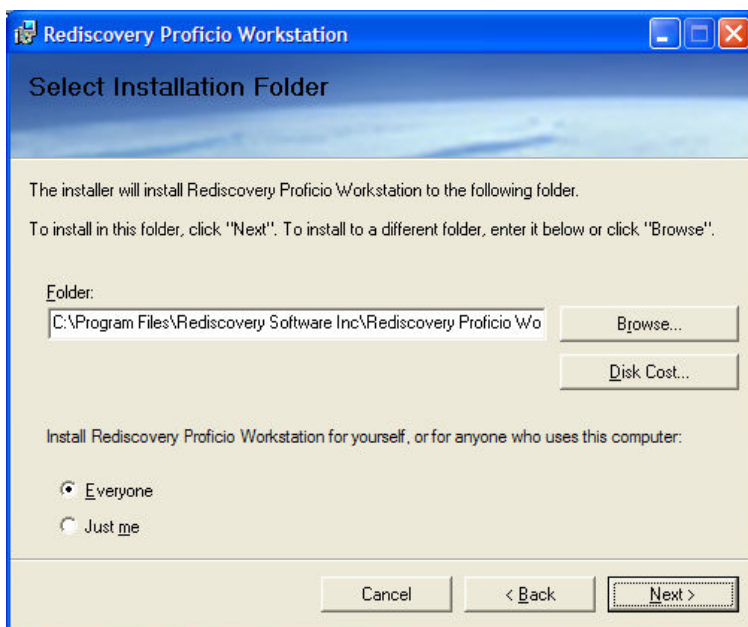
**Note:** You will use the Rediscovery ICMS Workstation Installation instructions for installing workstations on individual computers that will access the program on this server over the network. See Section G below.



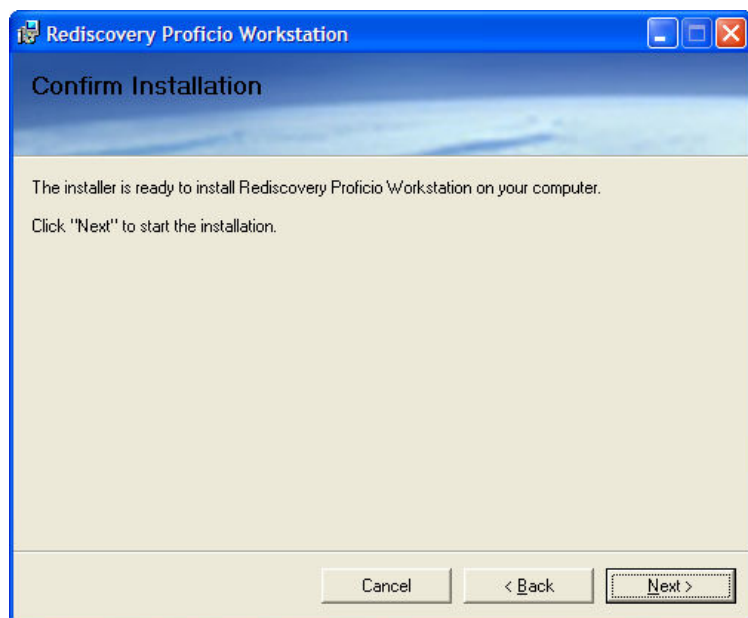
- Click Next to continue.



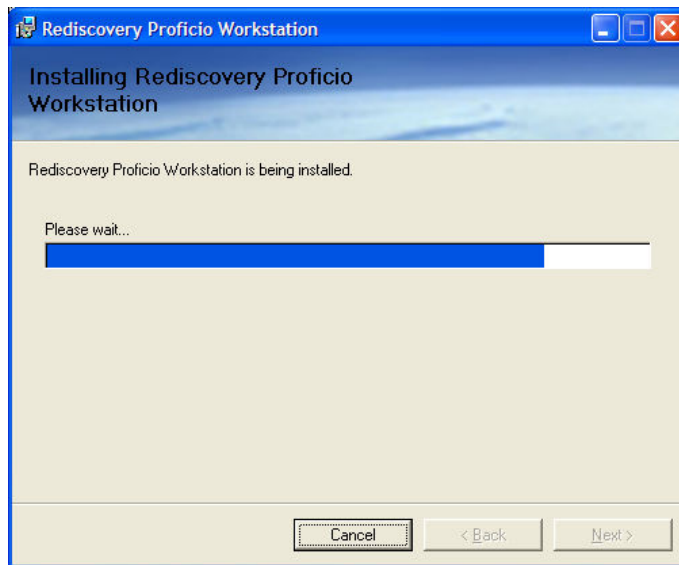
- Review the End-User license Agreement. Select "I Agree" and click Next.



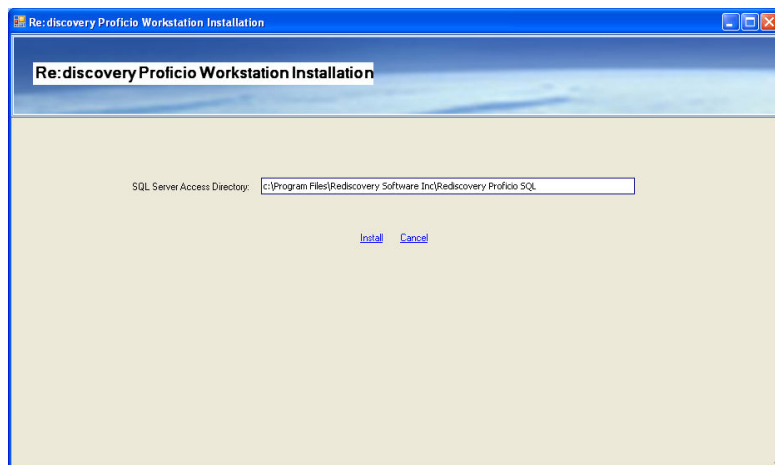
- The workstation component will install to the folder C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same root path here as you did when installing the main ICMS components above (page B:23), leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select "Everyone," then click Next.



- To confirm the installation, click Next.



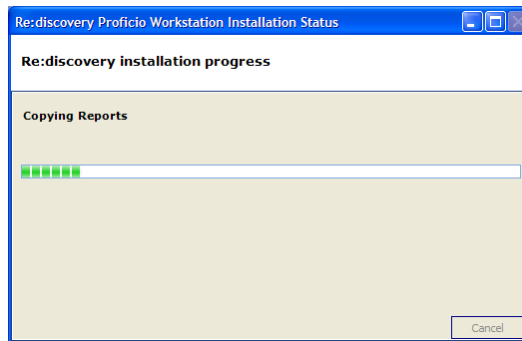
- The installation will proceed.
- In the next window, indicate the SQL Server Access Directory. Enter the same path you used on the first line on page B:25 above when indicating how the workstation will reference the server installation.



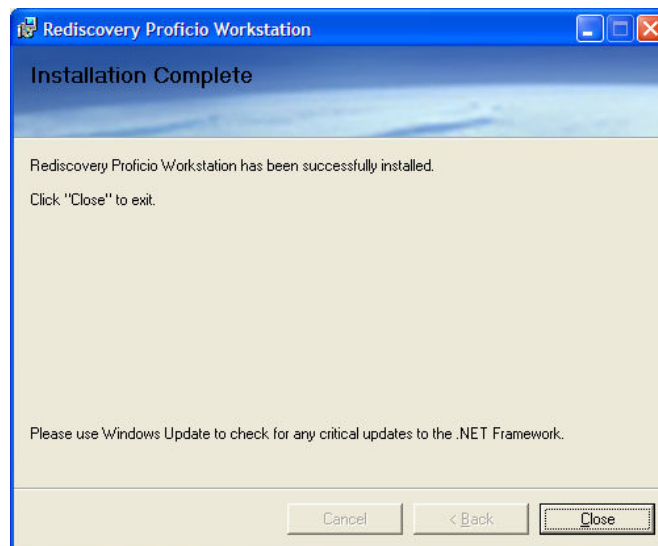
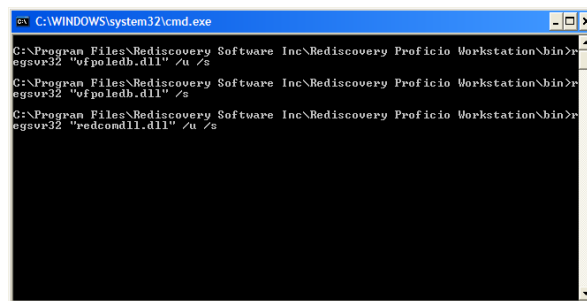
**For server installations:** use the UNC path you entered on page B:25 above. For example:  
**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL\**  
**\\ServerName\sharename\Rediscovery Software inc\Rediscovery Proficio SQL\**

**For standalone installations:**  
**C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL**  
 or the path you used on page B:25 above.

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



- A DOS window will appear briefly just before completion.



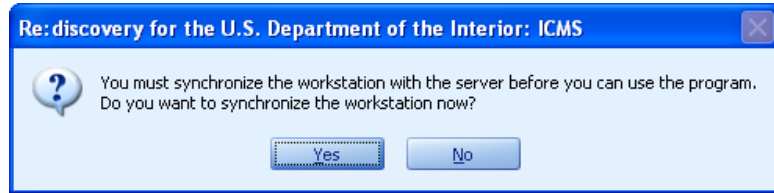
- When the installation is complete, click Close.
- Your installation is complete. Click Close on the installation menu.

If you are installing ICMS on a standalone computer, you are finished!

Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button, under All Programs. Start the program to test the installation. The default login is the User ID **red** and the password **red**. This is an Administrator level login.



**Note:** When you start the program for the first time, it may ask to Synchronize with the server. Click Yes.



**Note:** If you plan to access the program from other individual computers over the network, please refer to the instructions for Network Configuration and Workstation Installation to enable remote connections to SQL (Section F below). Install the client portion on the workstations that will be connecting to this server installation (see Section G below).

4. *What File Permissions must be established on the program folder?*

You must now set File Permissions through Windows Explorer. The three basic Re:discovery user profiles that will need certain permissions established to run the program are:

- Public Search – users with only Public Search or Researcher rights for read-only access to the data.
- Data Entry – general users with Data Entry rights, without access to the administrative functions within Re:discovery.
- ICMS Administrator – power users with full access to all functions including creating new directories and backup functions.

The following chart lists the folder and subfolders with the permissions required depending on the user's security profile within the program. These folders are located in C:\Program Files\Rediscovery Software Inc\ on the server.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator**
Rediscovery Proficio SQL			Full
Bin	R	R	Full
Data		R	Full
Docs	R	R	Full
Dictionaries		R	Full
FullImages		RWD	Full
Query Express		R	Full
RediscoveryForInternet	R	R	Full
Sweep		R	Full
Thumbnails		RWD	Full
Updater		RWD	Full
Upgrade		R	Full
VisualRediscovery		RWD	Full
WorkstationInstall			Full
Connection.config file	R	R	Full
Rediscovery Proficio Workstation	R	R	Full
Bin	R	RWD	Full
Dictionaries	R	R	Full
Docs	R	R	Full
Query Express		R	Full
RediscoveryForInternet	R	R	Full

Synchronizer	Full	Full	Full
Upgrade		R	Full
VisualRediscovery	R	RWD	Full

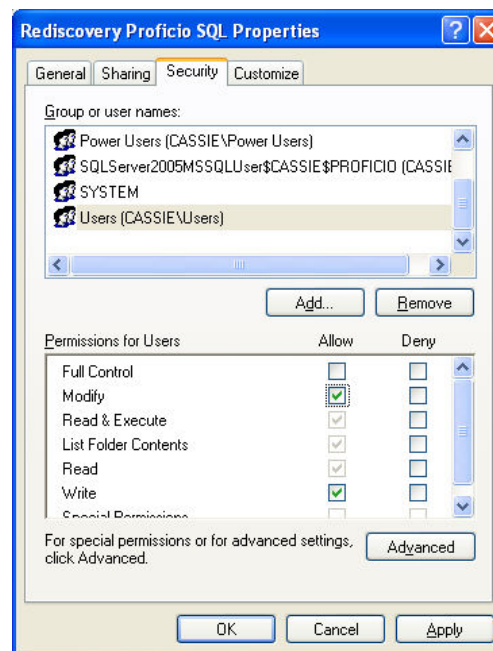
R = Read & Execute + List Folder Contents + Read, W = Write, D = Delete

\*\* ICMS Administrators require full permissions on the Rediscovery Proficio SQL folder to create and delete subfolders when they create new directories and perform data backups or transfers to disk.

#### 5. How do I set up file permissions?

To set up file permissions:

- Open Windows Explorer and navigate to the C:\program files\Rediscovery Software Inc\Rediscovery Proficio SQL folder.
- Right click on the folder and choose Sharing and Security.
- Select the Security tab.



- You can either add different groups to the list if you have users separated into groups, or select the Users group from the list.
- Use the chart above to define permissions for each user profile. If you are only using the Users group, you should check the Modify and Write permissions. Read & Execute, List Folder Contents, and Read are usually automatically selected when a new program is installed. You can apply these permissions to the entire Rediscovery Proficio SQL folder, or, if you prefer, select the individual subfolders and apply permissions as shown in the chart above.
- Click Apply, then OK to save the File Permissions.
- Follow the same steps to set the file permissions on the C:\program files\Rediscovery Software Inc\Rediscovery Proficio Workstation folder.

***You must now enable remote connections to SQL in Section F below, and install the client portion on the workstations that will be connecting to this server installation using Section G below.***

## **F. Network Configuration for Network Installations**

***You must complete this section if you are using the SQL Server Express (Option 1) or SQL Server 2005 Standard Edition (Option 2) installations in a network environment.***

### **1. What network configurations must be done to access the program across a network?**

To use the program in a network environment, you must:

- enable remote connections to the SQL Server Standard Edition
- enable the SQL Server Browser Service for SQL Server Standard Edition
- enable SQL Server communication through the firewall (if turned on)
- share a folder on the server where ICMS is installed to allow access to the program on the network
- set additional network permissions on the shared folder

**Note:** Remote connections and SQL Server Browser Service are automatically configured during the SQL Server Express installation in Option 1 – skip to F.4 below to continue with the other network configurations.

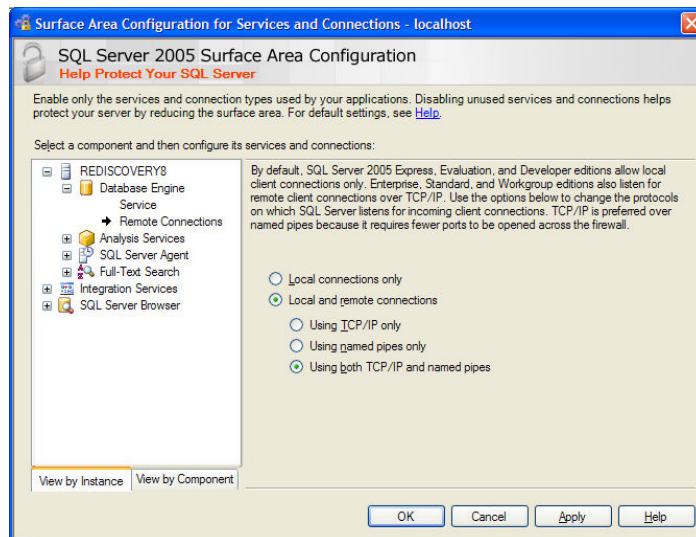
### **2. How do I enable remote connections to the SQL Server Standard Edition?**

To enable remote connects for your SQL Server 2005 Standard Edition installation:

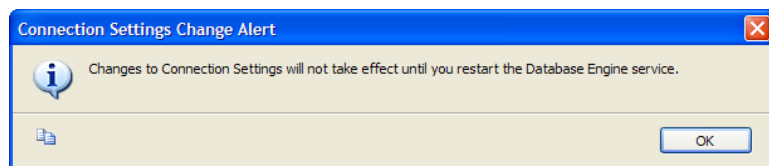
- Click the Start button on your task bar and select All Programs. Then select Microsoft SQL Server 2005 → Configuration Tools → SQL Server Surface Area Configuration.



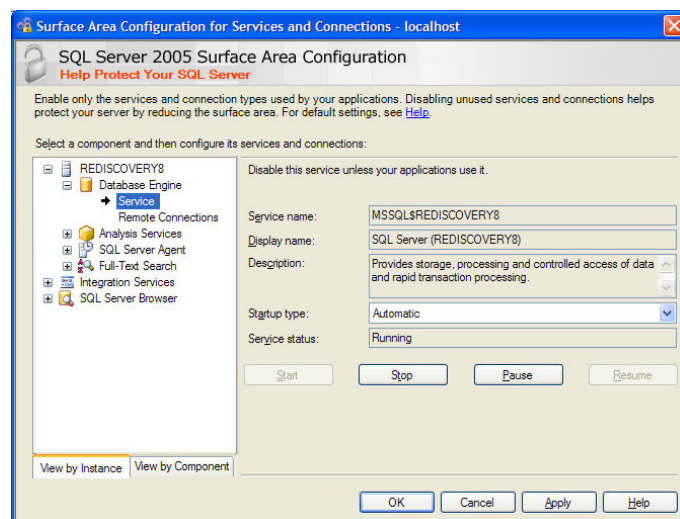
- On the SQL Server 2005 Surface Area Configuration page, click Surface Area Configuration for Services and Connections.



- On the Surface Area Configuration for Services and Connections page, under your named instance, expand Database Engine and click Remote Connections. Select “Local and remote connections” and choose the “Using both TCP/IP and named pipes” option. Click Apply.
- You will receive the following message:



- Click OK.



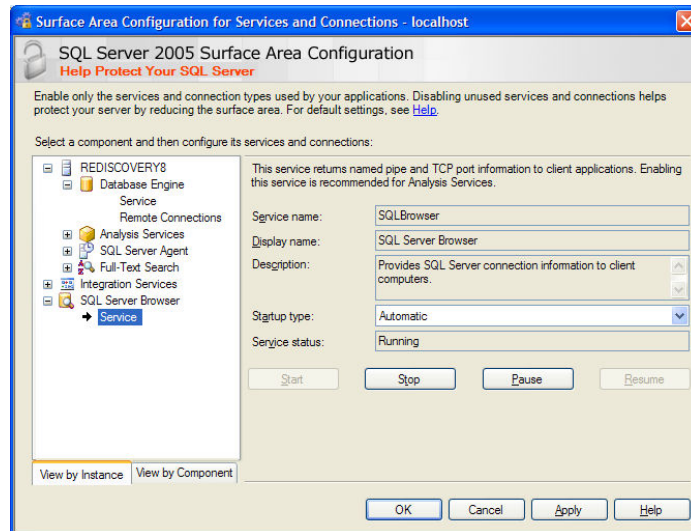
- Under Database Engine, click Service. Make sure that the Startup type is Automatic. If not, select Automatic from the pull down menu.
- Then click Stop and wait until the service stops.
- Then click Start to restart the service.

***Do not exit this screen yet, continue with F.3 below.***

3. *How do I enable the SQL Browser Service for SQL Server Standard Edition?*

To enable the SQL Browser Service for the SQL Server 2005 Standard Edition installation:

- In the same Surface Area and Configuration for Services and Connections window, expand the SQL Server Browser on the left and select Service.



- Select Automatic for Startup type. Then click Apply.
- Click Start to start the service. **Note:** If it is already set to automatic and the status is running, you do not need to do anything in this screen.
- Click OK to close the window.

4. *How do I enable communications through the Windows firewall?*

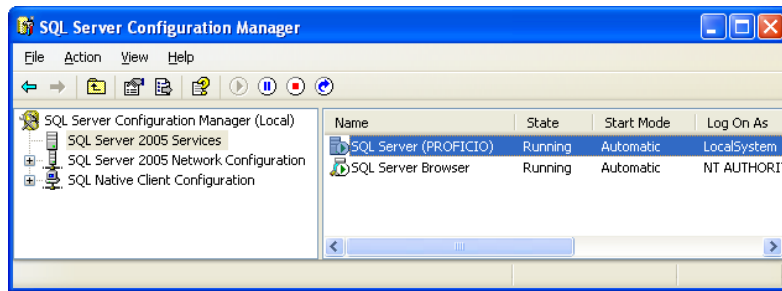
You must enable communications through the Windows firewall for both installations Option 1 (SQL Express Edition) and Option 2 (SQL Standard Edition) if your Windows firewall is turned on.

**Note:** If you use SQL server as the backend database engine for other applications, you may have more than one instance of SQL Server. You must create an exception in the firewall for each instance of SQL Server 2005 that you want to accept remote connections.

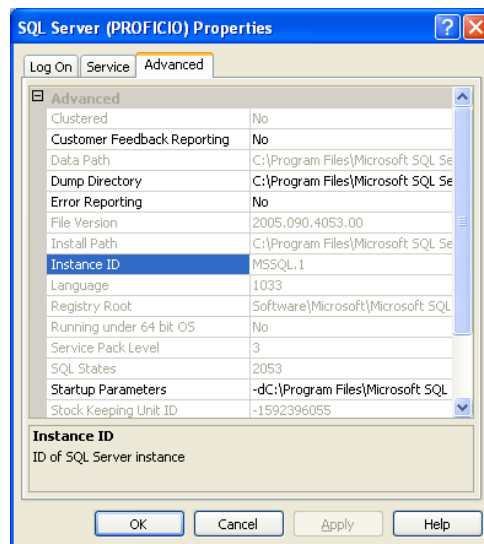
***If Windows Firewall is turned off on your system, you may skip this step***

To create an exception for the instance of SQL Server used by Re:discovery Version 8, you must first identify the correct instance ID.

- Click the Start button on your task bar and select All Programs. Then select Microsoft SQL Server 2005 → Configuration Tools → SQL Server Configuration Manager.



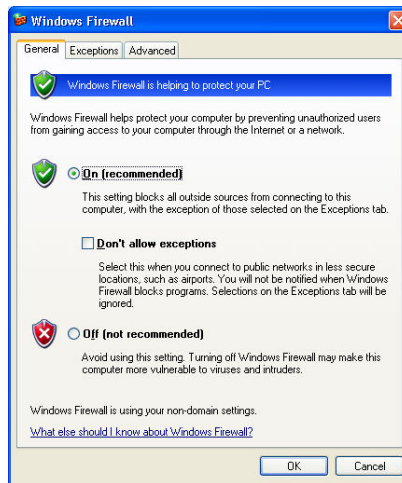
- Select SQL Server 2005 Services in the left pane and then right click on the instance name in the main window and select Properties. For installations using SQL Server Express (Option 1) the instance name is SQL Server (PROFICIO). For installations using SQL Server 2005 (Option 2), the instance name is decided by the SQL administrator at your location and is prompted for during the installation process (called SQL Server Name).



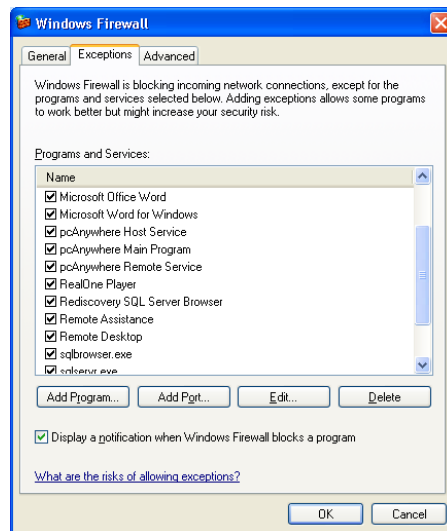
- Click the Advanced tab and locate the Instance ID in the property list. Make a note of it and then click OK.

To create the exception in the firewall for that instance:

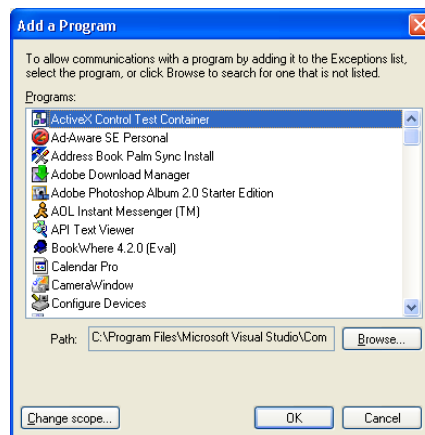
- Click Start on the task bar and choose Control Panel. Then click Windows Firewall.



- Click the Exceptions tab.

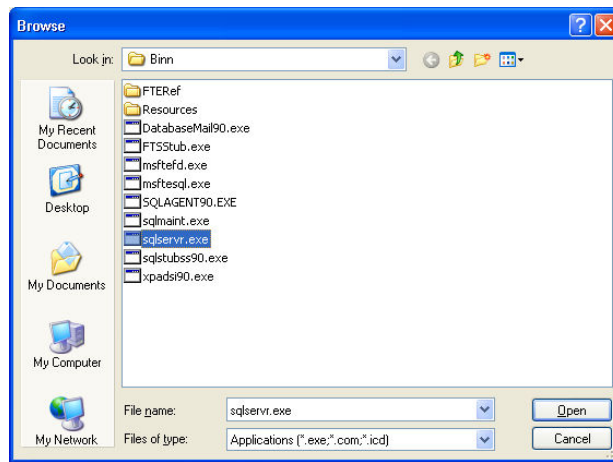


- Click the Add Program button.



- In the Add a Program window, click the Browse button.

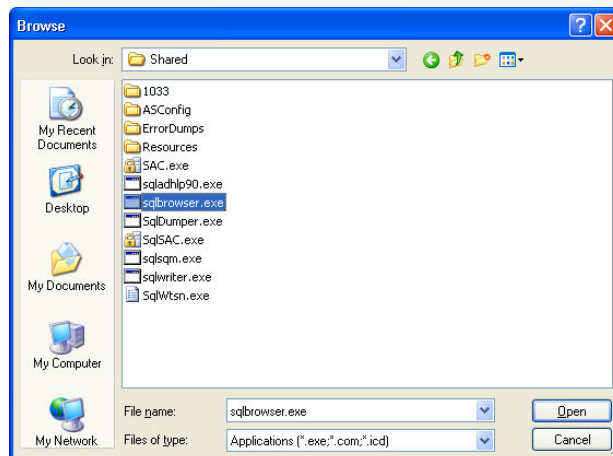
- Navigate to and select the **C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe** executable program. Then click Open. **Note:** the path may be different depending on where SQL Server 2005 is installed. *MSSQL.1* is the placeholder for the instance ID name that you made note of above.



- When you return to the Add a Program window, remain there and go immediately to the next step below to add the exception for the SQL Server Browser Service.

To Create an exception in the firewall for the SQL Server Browser Service:

- In the Add a Program window (which you accessed from the Exceptions tab of the Windows Firewall), click Browse.
- Navigate to and select the **C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe** executable program file. Click Open. **Note:** the path may be different depending on where SQL Server 2005 is installed.

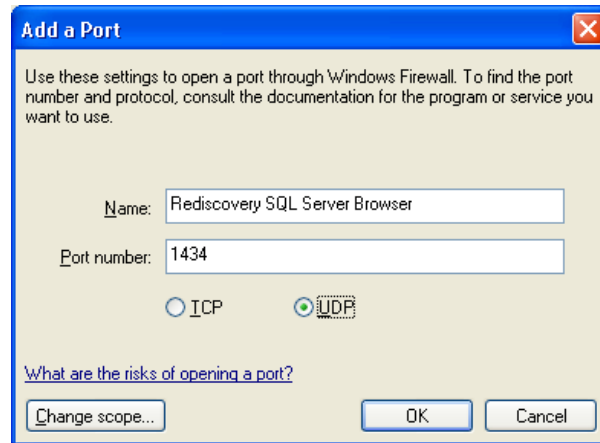


- When you return to the Add a Program window, click OK. Remain on the Windows Firewall Exceptions tab for the next step below.



To open UDP port 1434 in Windows Firewall:

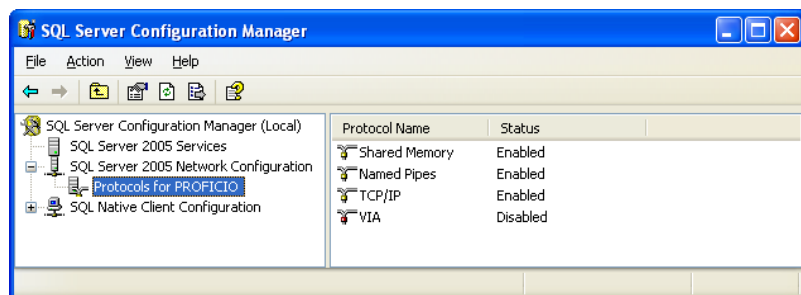
- On the Windows Firewall Exceptions tab, click Add Port.



- In the Add a Port window, type **Rediscovery SQL Server Browser** in the Name text box.
- Type **1434** for the Port number.
- Select **UDP** for the port type.
- Click OK.
- When you return to the Windows Firewall screen, click OK to close the window.

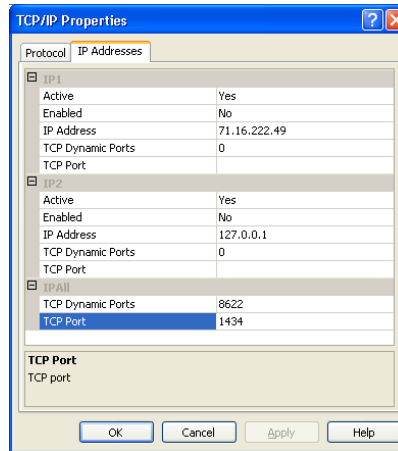
To make sure the Dynamic port is enabled, you will need to set the IPALL property in SQL to port 1434:

- Click the Start button on your task bar and select All Programs. Then select Microsoft SQL Server 2005 → Configuration Tools → SQL Server Configuration Manager.



- In the SQL Server Configuration Manager window, expand the SQL Server 2005 Network Configuration in the left pane and select **Protocols for (Instance Name)**. (Note: The instance name will be PROFICIO for the SQL Server Express installation, or the instance name created by you for SQL Server 2005 Standard Edition.)

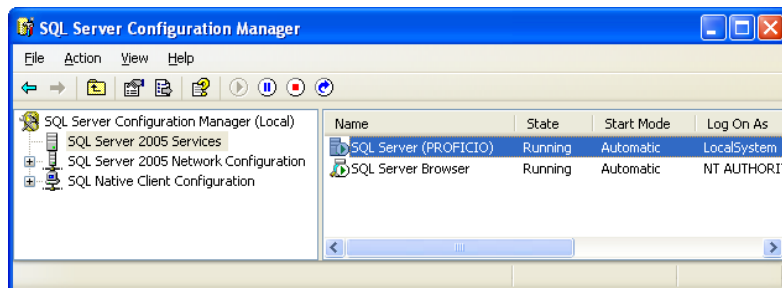
- In the right pane, right-click **TCP/IP**, and select Properties.
- In the TCP/IP Properties window, select the IP Addresses tab.



- For **IPALL**, set the TCP Port = 1434.

**Note:** If you already have another instance of SQL Server using this port, you need to use a different port (1435 for instance) and create an exception for the UDP port in Windows Firewall.

- Click OK. You will get a message telling you that you need to restart the service for the settings to take effect.
- To restart the service, select SQL Server 2005 Services in the left pane.



- In the right pane, right click on the **SQL Server (InstanceName)** where InstanceName is either PROFICIO if you are using the SQL Server Express installation, or the instance name you created for SQL Server 2005 Standard Edition.
- On the right-click menu, click Restart and the service will stop and then restart to make the changes to the settings take affect. (If Restart is not enabled, the service was not running. Click Start to start the service.)

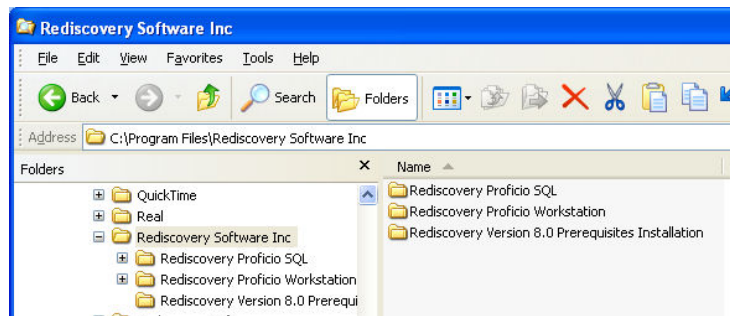
**Note:** Make sure the Start Mode is set to Automatic. If not, right click on the SQL server instance again and select Properties. In the Properties window, select the Service tab and change the Start Mode option to Automatic. Click OK in the Properties window.

- Next, in the right pane, check the SQL Server Browser option to make sure it is running and the Start Mode is set to Automatic. If it is not running, right click on it and select Start. If it is not set to Automatic, right click on it and select Properties. In the Properties window, select the Service tab and change the Start Mode option to Automatic. Click OK.

5. *How do I create a share on the server to access the program across the network?*

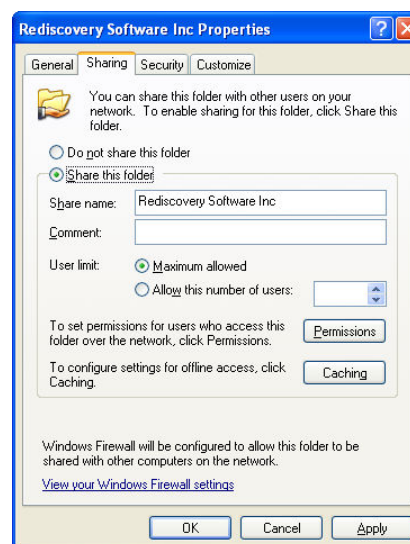
You must create a shared folder on the server for both installations Option 1 (SQL Express Edition) and Option 2 (SQL Standard Edition). To create this share:

- In Windows Explorer, navigate to the location where you installed **ICMS** on the server. Generally this will be C:\Program Files\Rediscovery Software Inc\.



**Note:** We recommend that you create the share on the Rediscovery Software Inc folder, but you may choose to share a folder higher up such as Program Files or the entire drive itself.

- Right click on the folder you wish to share, such as Rediscovery Software Inc, and choose Properties.



- Click on the Sharing tab.
- Select the "Share this folder" option.

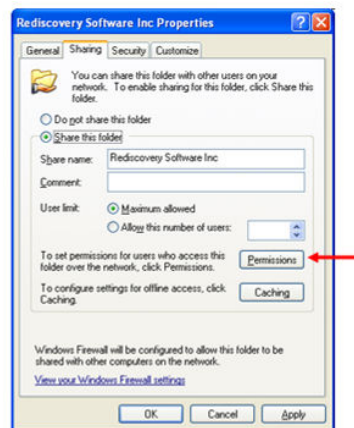
- The share name will automatically fill in with the name of the folder. We recommend using this as the share name, but you may change it if desired.
- Click Apply.

You now need to set up the permissions on the share from this window, so do not close this window until you complete F.6 below.

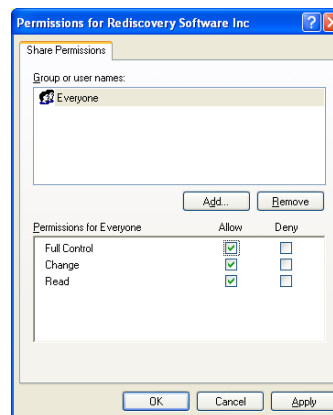
6. *How do I configure the share permissions on the shared folder on the server?*

In addition to the file permissions set on the program folders, you also need to set the share permissions so that each user has a minimum of Change and Read rights in the share (unless you give the Everyone account Full Control). To set up the share permissions:

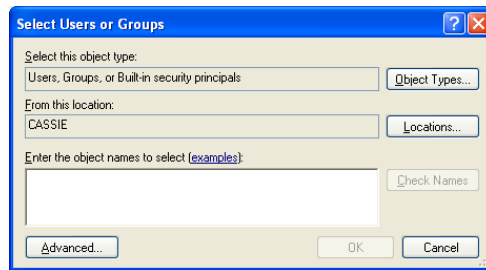
- From the Sharing tab in the Properties window for the shared folder, click the Permissions button.



- You may choose to give Everyone Full Control on the share, or you may add individual or group network accounts and assign rights to each.



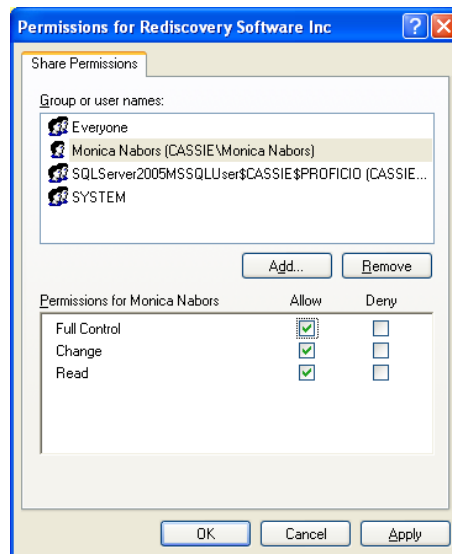
- If you choose not to give Everyone full control or have removed the Everyone group from the list, then you must add individual or group network accounts. Click the Add button.



- Enter the individual or group network accounts in the “Enter the object names to select” box. **Note:** you may add multiple accounts at once if you separate them with a semicolon.
- Click OK to add the accounts. Then give each account Full Control (or a minimum of Change and Read permissions).
- Then, in addition to the individual or group network logon accounts, there are two other user/group accounts that must be granted access to the network share and folder security for the program.
  - SQL user group account – the SQL user account is a group account created by SQL to perform database tasks. This SQL account must have Full permissions in both the network share and Rediscovery Proficio SQL folder security on the server. The specific account name is `SQLServer2005MSSQLUser$computername$InstanceName`. **Note:** This is not a network account, only a local account where SQL is installed.
  - SQL service logon account – SQL has a service that runs continuously on the server or stand alone system. This service runs under a specified account, generally “Local System.” The Local System account (listed as ‘System’ in the user/group list) must be granted Full permissions in the security on the Rediscovery Proficio SQL folder for certain functions to work within the program such as backups and creating directories. If the service is using a different logon account, that account must be granted these same security permissions.

**Service Account:** To determine which account is being used by the SQL service, go to Control Panel → Administrative Tools → Services. In the list of services, locate the SQL Server (Proficio) entry. Right click on this service and select Properties. In the Properties window, select the Log On tab. It will either be set to Local System Account (recommended) or This Account with a specific account name listed. If it is not set to Local System Account, we highly recommend that you change it to use the Local System Account. **Note:** When you apply this change, you will be asked to restart the service for the change to take affect. Right click on the SQL Server (Proficio) service and choose Restart.

- To add both of these local accounts (the SQL user group and the SQL service logon) to the share permissions you will need to change the Location in the Select Users or Groups window to the local computer by clicking the Location button and selecting the local computer name at the top of the list. Then follow the same steps as above to add them to the list. Give each of these Full Control.



***Once you have completed the network installation and configurations, you can install the client component on the workstations in Section G below.***

## G. Installing Workstations for Network Installations

### 1. *When do I need to install workstations?*

Use this option to install the client component on workstations for a network installation. You must install Option 1 or Option 2 on the server and complete the network configurations in F above before you can install workstations.

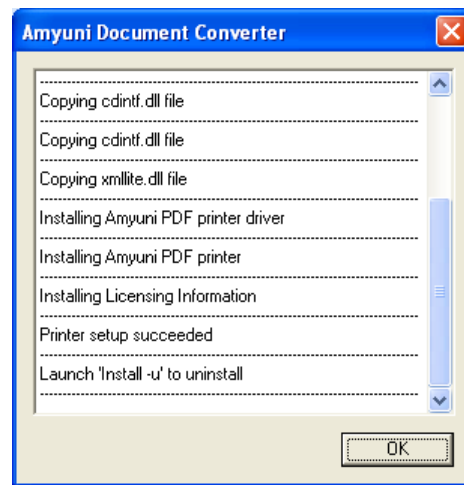
### 2. *How do I install workstations?*

To install workstations for a network installation:

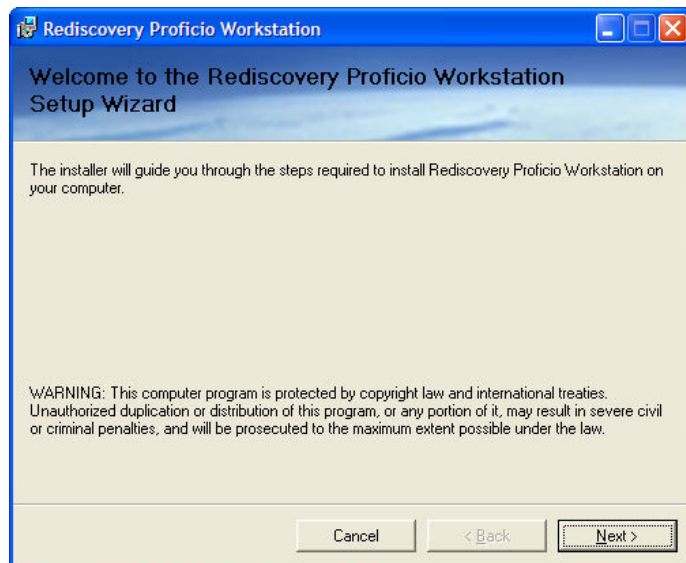
- First, install the prerequisites on each workstation following Section C above.
- Then, on the installation menu, click the **Install ICMS Workstation** button.



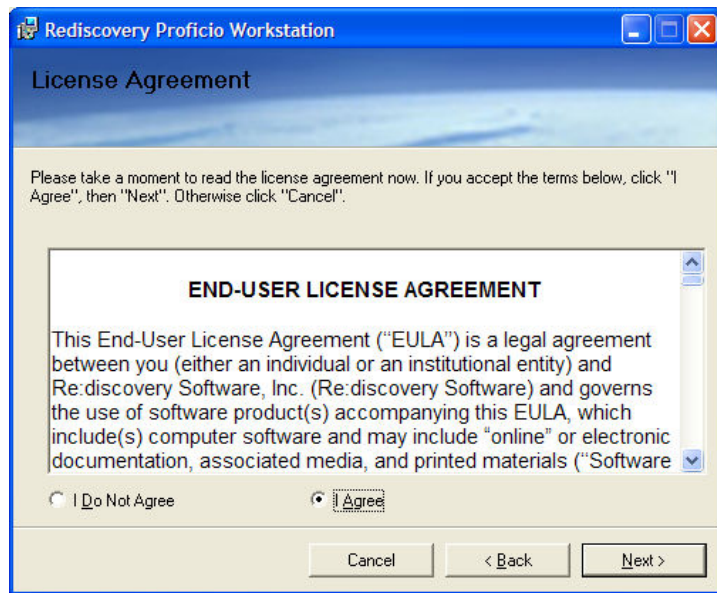
- The installation will install the Amyuni Document Converter.



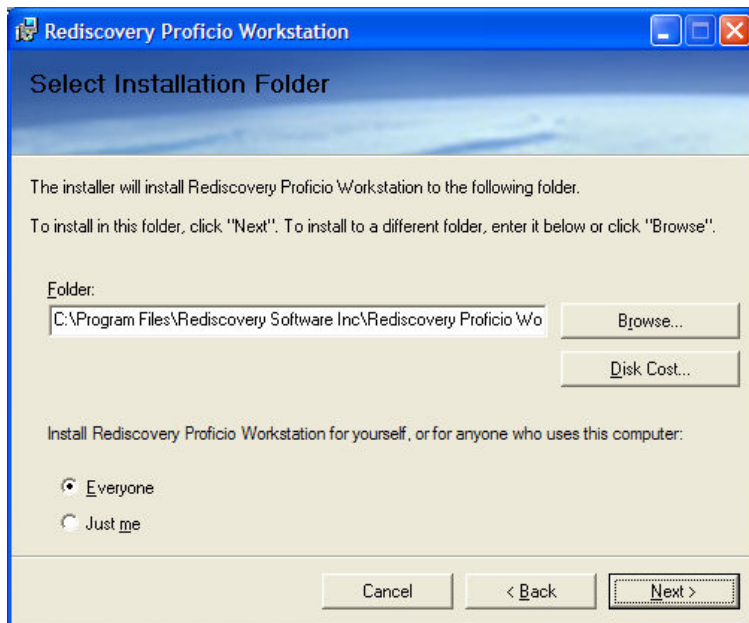
- Click OK when complete.
- The Windows Installer will prepare the installation.



- Click Next to continue.

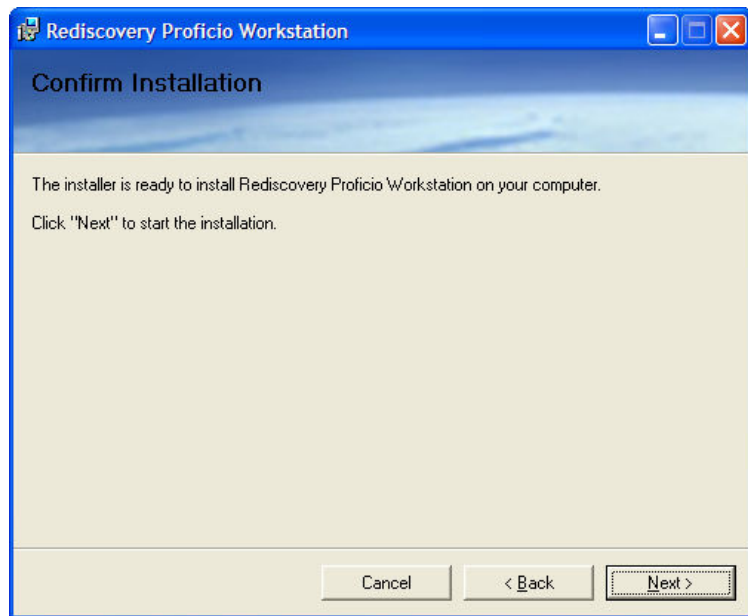


- Review the End-User license Agreement. Select “I Agree” and click Next.

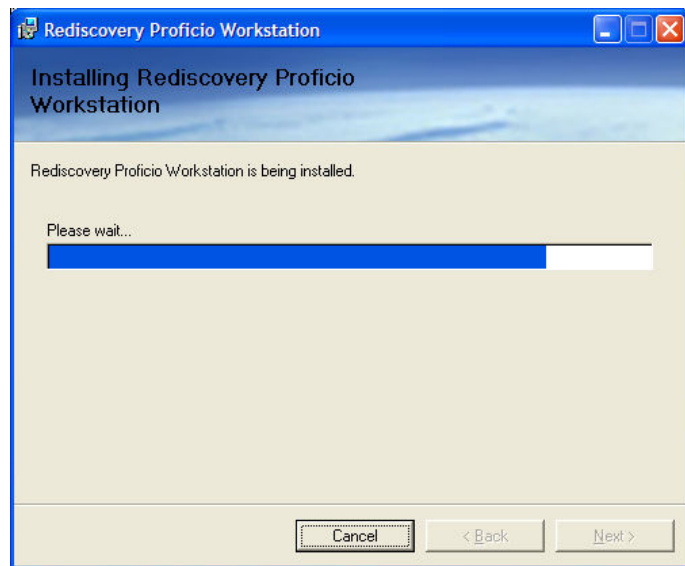


- The workstation component will install to the folder C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio Workstation. If you are installing the program to an alternate location on this computer, use the same path here as you did for the prerequisites installation, leaving the remaining folder structure as \Rediscovery Software Inc\Rediscovery Proficio Workstation\. Select “Everyone,” then click Next.

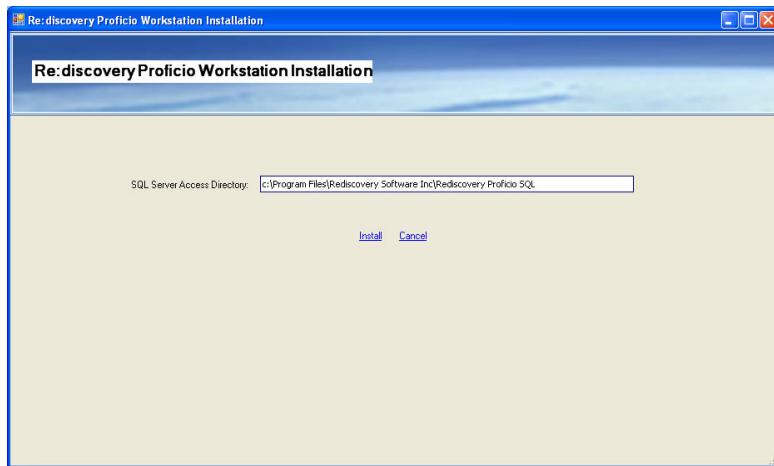




- To confirm the installation, click Next.



- The installation will proceed.
- In the next window, indicate the SQL Server Access Directory. This will be the UNC path to your server installation. (A UNC path refers to the server name rather than a drive letter).



For example:

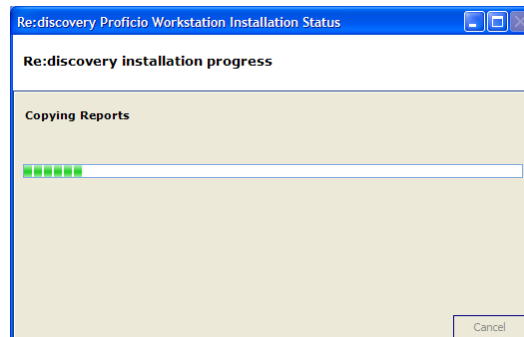
If the network share is on the Rediscovery Software Inc folder on the server:

**\\ServerName\Rediscovery Software Inc\Rediscovery Proficio SQL**

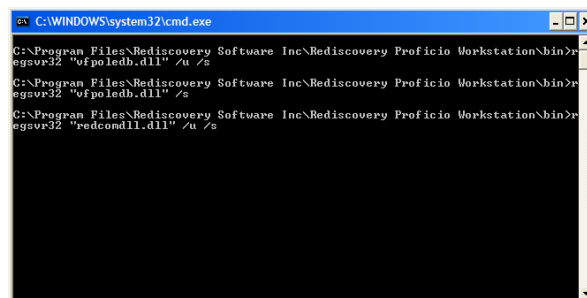
If the network share is on a folder above the Rediscovery Software Inc folder on the server:

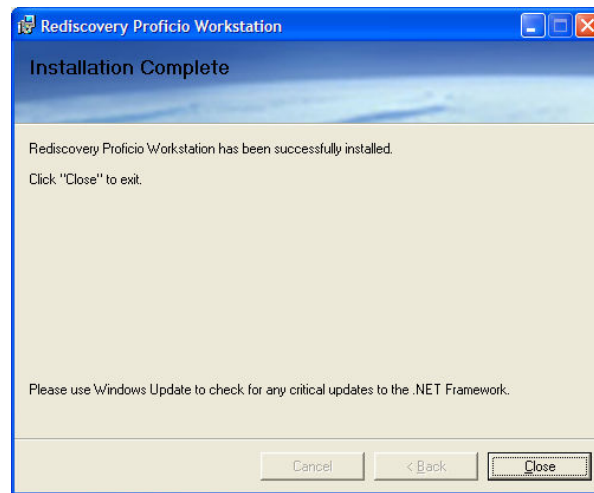
**\\ServerName\sharename\Rediscovery Software Inc\Rediscovery Proficio SQL\**

- Click Install.
- Please wait while the Workstation installs. This may take 3-5 minutes to complete, depending on the speed of your computer. Be patient and it will complete.



- A DOS window will appear briefly just before completion.

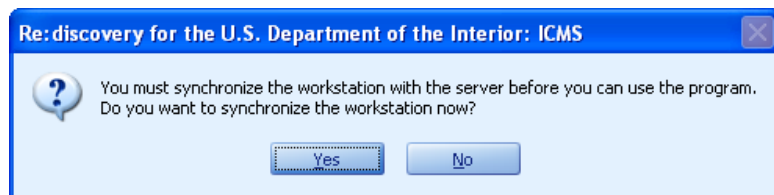




- When the installation is complete, click Close.
- Your ICMS Workstation is now installed. Click Close on the installation menu.

Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button, under All Programs.

**Note:** When you start the program for the first time, it may ask to Synchronize with the server. Click Yes.



3. *What file permissions are required on the workstation installation?*

You must set up file permissions on the workstation installation for certain folders so that users can create some reports. The following chart lists the folder and subfolders with the permissions required depending on the user's security profile within the program. The folders are located under C:\Program Files\Rediscovery Software Inc\ on the workstation.

Folder name	Permissions by User Type		
	Public Search	Data Entry	ICMS Administrator
Rediscovery Proficio Workstation	R	RWD	Full
Bin	R	RWD	Full
Dictionaries	R	R	Full
Docs	R	R	Full
Query Express		R	Full
RediscoveryForInternet	R	R	Full
Synchronizer	Full	Full	Full
Upgrade		R	Full
VisualRediscovery	R	RWD	Full

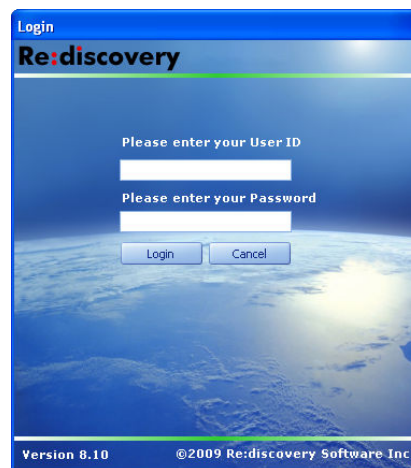
R = Read & Execute + List Folder Contents+ Read, W = Write, D = Delete

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## H. Starting and Using ICMS

### 1. How do I start the system?

Start **ICMS** by double-clicking the Rediscovery ICMS desktop icon, or from the Windows Start button by choosing All Programs, Rediscovery ICMS, and then Rediscovery ICMS. The Re:discovery login screen will open.



### 2. How do I login to the system for the first time?

For your first-time use, you will enter a general login name and password.

- Enter RED as your login name
- Tab to the password field and enter RED as your password.
- Press Enter or click the Login button.

**Note:** The system will contain no data directories until you create them.

Refer to Section IV in Chapter 9, Tools for information on how to create new directories.

*For security purposes, it's important that you change the general password and login name as soon as possible. Create specific passwords and login names for unit staff when you finish the installation process described in this appendix. Refer to Section VI in Chapter 9, Tools.*

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## I. Running the ICMS Upgrade

### 1. How do I upgrade my ANCS+ 8.0 to ICMS?

The ICMS upgrade is for the NPS sites who are currently using ANCS+ 8.0. You will need to upgrade your system to ICMS. The ICMS upgrade will update your existing system in place so that you do not need to install ICMS separately.

There are two types of upgrades explained in these instructions:

**Upgrading an ANCS+ Standalone or Server installation:** Upgrade an ANCS+ 8.0 standalone or server system where the data “live.” A standalone ANCS+ may be on a laptop or desktop computer. A server ANCS+ system may be on a network server or on a shared desktop computer. All parks will perform this upgrade. (I.4 below)

**NOTE: This must be run directly on the standalone or server system where the data “live.” It cannot be run across a network connection.**

**Upgrading an ANCS+ workstation:** Upgrade an ANCS+ workstation that shares data that “lives” on another computer (server or shared computer) across a network. Parks that have ANCS+ workstations that share data across a network will perform this upgrade. (1.5 below)

***It is strongly recommended that you back up your ANCS+ system before beginning this upgrade. In ANCS+, from the File menu, choose Backup Data, then choose the “Complete System Backup” option to make the backup.***

2. *What should I do before I start the upgrade?*

Before running the upgrade, close all programs and deactivate the screen saver. If this is on a laptop, plug the laptop into a wall outlet and deactivate all “sleep” and screen saver options. This will maximize processor attention to the ICMS upgrade.

Make sure that your computer has enough free space on the drive where the data live. We recommend a minimum of 2 GB free space. In addition, you may want to delete any temporary or working directories in ANCS+ that you no longer need.

3. *How long will it take to upgrade to ICMS?*

This ICMS upgrade process will take 10-15 minutes for most parks, depending on the speed of your computer and the number of directories in your ANCS+ system.

4. *How do I run the upgrade for an ANCS+ standalone or server installation?*

***This upgrade must be run on the standalone or server system directly where the data “live.” It cannot be run across a network connection.***

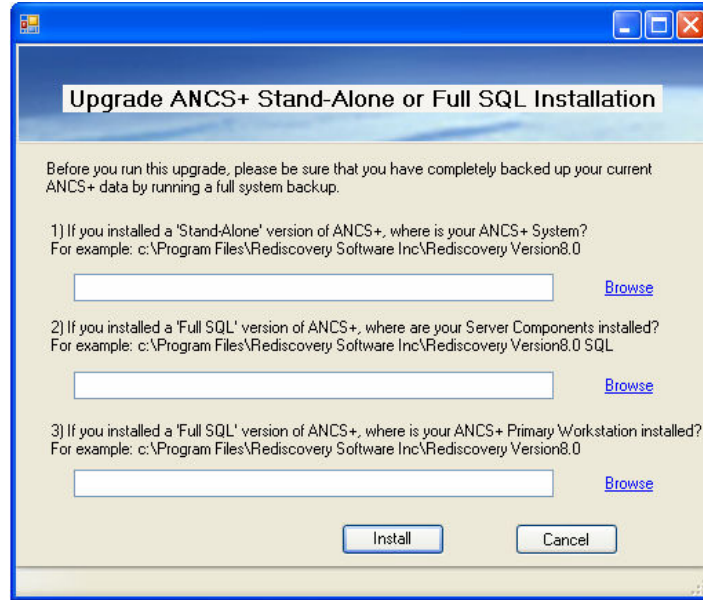
To begin, insert the ICMS DVD in your CD/DVD drive. The installation menu will open:



**Note:** If the installation menu does not open automatically, use My Computer or Windows Explorer to navigate to your CD/DVD drive. Double-click the file “autorun.exe.”

- On the installation menu, click the **Upgrade ANCS+ to ICMS** button.
- The Upgrade window opens. Determine the appropriate line or lines to

use by following the instructions on the screen and in the text below.



*(Complete option 1 or 2 below depending on your original installation, but not both.)*

1. **Standalone:** Most parks will use this option. If ANCS+ is installed as a standalone on a laptop or desktop or on a shared computer or server using the ANCS+ “standalone” (SQL Express) option for small databases and no more than five concurrent users, fill in only item 1). Select the path, which is usually:

- Click the Browse link next to item 1). Select the path, which is usually:

C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0

- Click the Install button to continue. Lines 2 and 3 should be left blank.

2. **Full SQL Server:** Some parks and centers will use this option. If ANCS+ is installed on a shared computer or network server using the SQL Server option for large databases and more than five concurrent users, you will fill in both items 2) and 3).

- Click the Browse link next to item 2). Select the path, which may be specific to your site, but is usually:

C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0 SQL

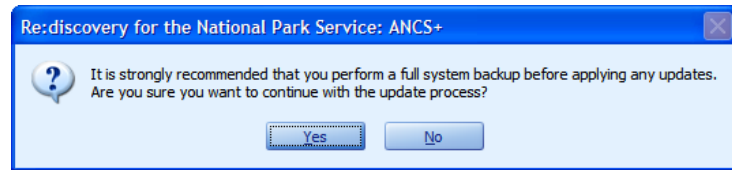
- Click the Browse link next to item 3). Select the path, which is usually:

C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0

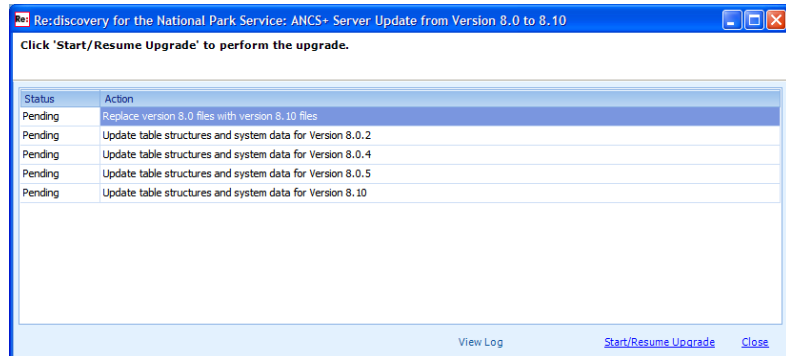
- Click the Install button to continue. Line 1 should be left blank.

After clicking the Install button, please be patient while the upgrade files are

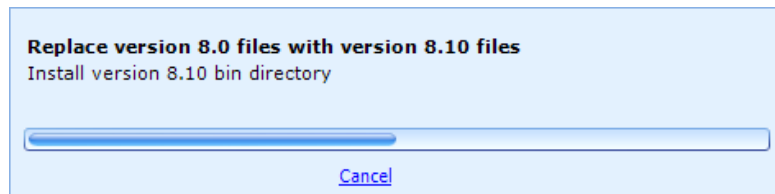
extracted.



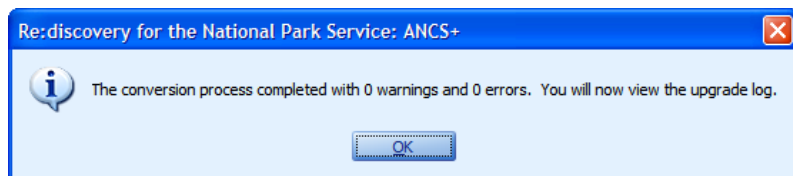
- After a few minutes, a message opens, recommending that you perform a full system backup before applying the ICMS update. If you have made a complete backup, click Yes.



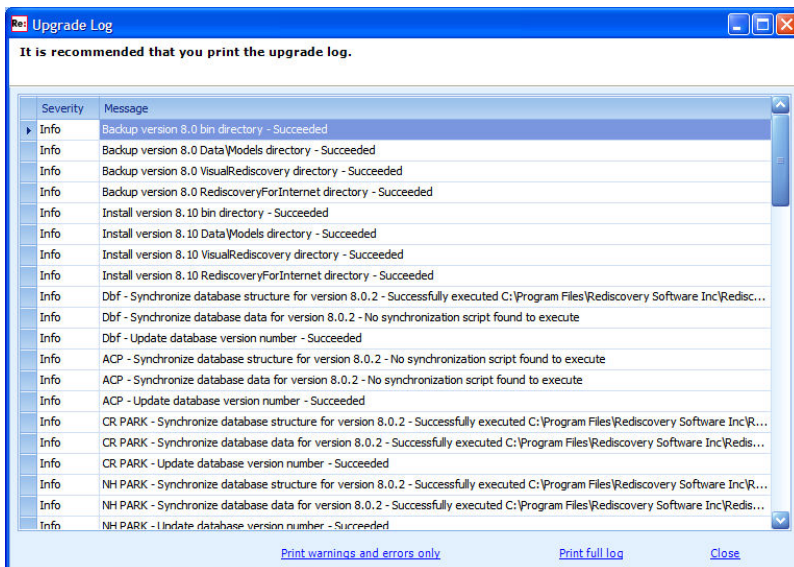
- The Upgrade Actions window opens. This lists the steps of the upgrade process. Click the Start/Resume Upgrade link to continue.



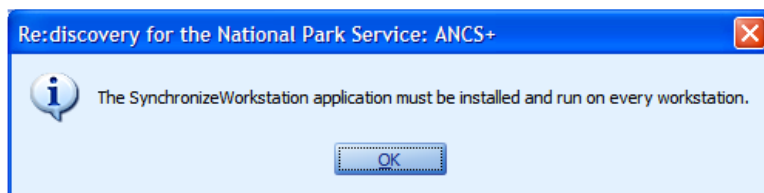
- A progress meter will display while the updates are being applied. Depending on the speed of your computer and the number of directories in your ANCS+ system, this may take several minutes. Please be patient.



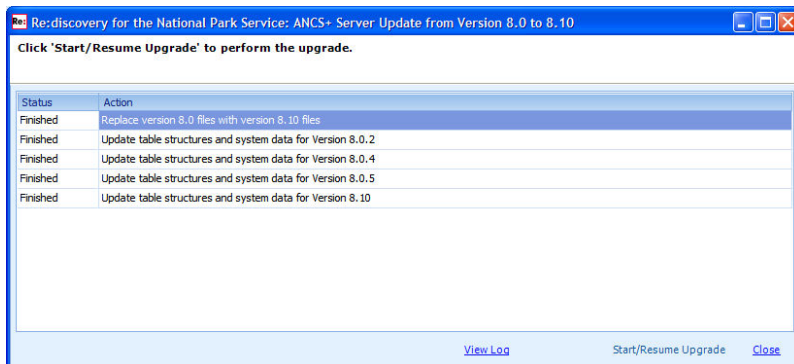
- When the upgrade is complete, you will get a confirmation message with information about how many warnings and/or errors were found during the upgrade process. Click OK to view the upgrade log.



- Review the upgrade log. If there are no warnings or errors, click Close. If there are warnings or errors, contact Re:discovery for assistance.

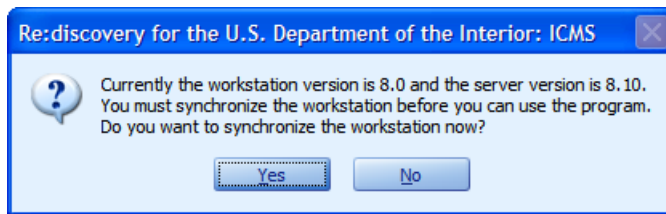


- The Synchronize Workstation message reminds you to also upgrade ANCS+ workstations, if you have any. The Synchronize Workstation tool will allow future updates to be applied only to the server, and then automatically update workstations. To upgrade ANCS+ workstations to ICMS, follow the steps for I.5 below. Click OK to continue.

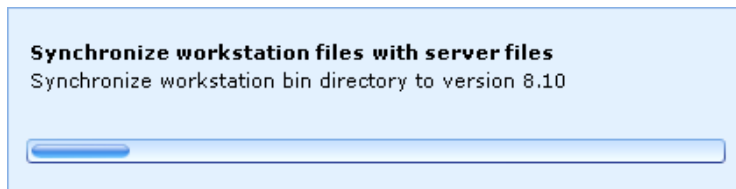


- When the updates are finished, click Close.

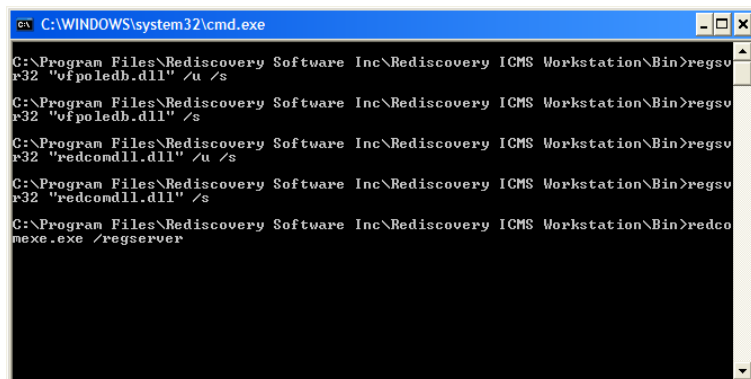




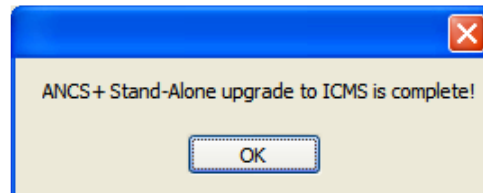
- The program may ask if you want to synchronize the workstation. A “workstation” is the end-user interface for accessing ICMS, whether on a standalone, shared computer, or network server installation. Click Yes.



- Please be patient while the workstation synchronizes with the server.



- An MS-DOS window will open briefly as it registers dll files. It will close automatically.



- The ICMS login window opens. Press Alt-Tab to see the message below, reporting that the upgrade to ICMS is complete. Click OK.



- Use your usual ANCS+ user ID and password to log in to ICMS. Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button under All Programs. Your previous shortcut for "Rediscovery Version8.0" will be inactive.
- If necessary, press Alt-Tab to view the installation menu. Click Close.



***Remember! If any workstations connect to this installation, you must upgrade those now. Use the instructions that begin next to upgrade all workstations.***

5. *How do I run the upgrade for an ANCS+ workstation?* Use this option to upgrade an ANCS+ workstation that shares data that "lives" on another computer across the network.

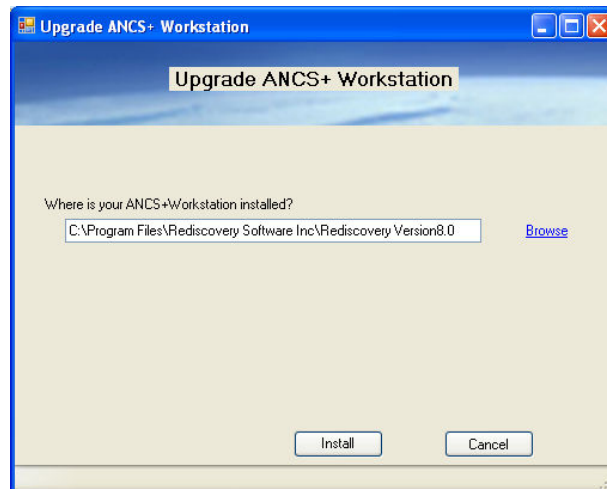
***Note: You must have already completed the upgrade on the server system where the data live before upgrading any workstation.***

To begin, insert the ICMS DVD in your CD/DVD drive on the workstation. The installation menu will open:

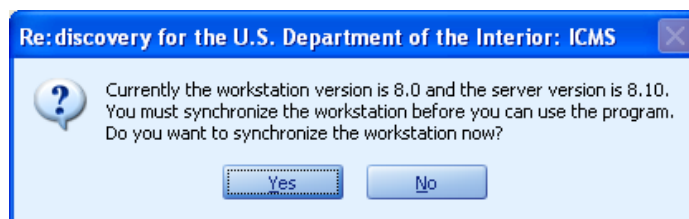


**Note:** If the installation menu does not open automatically, use My Computer or Windows Explorer to navigate to your CD/DVD drive. Double-click the file “autorun.exe.”

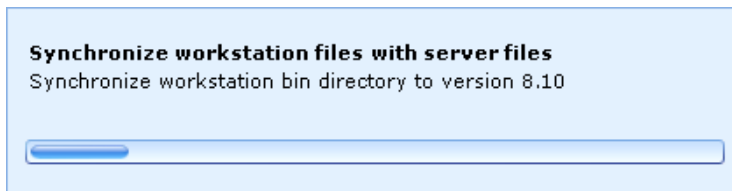
- On the installation menu, click the **Upgrade ANCS+ Workstation** button.



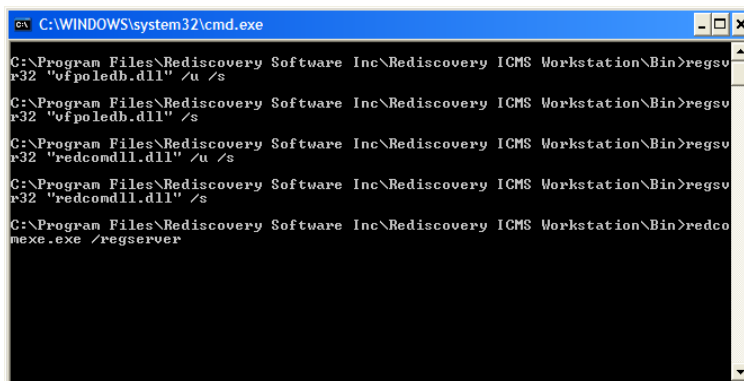
- The Upgrade ANCS+ Workstation window opens. Enter the path to the ANCS+ workstation. You can click the Browse link to select the location. In most cases, this will be C:\Program Files\Rediscovery Software Inc\Rediscovery Version8.0. Then click Install.
- Please be patient while the upgrade files are extracted.



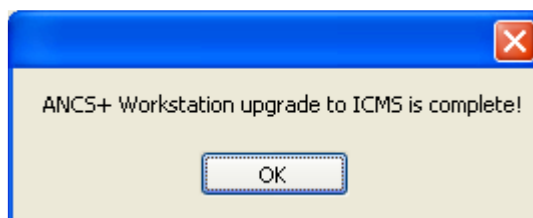
- The program will ask if you want to synchronize the workstation. Click Yes.



- Please be patient while the workstation synchronizes with the server.



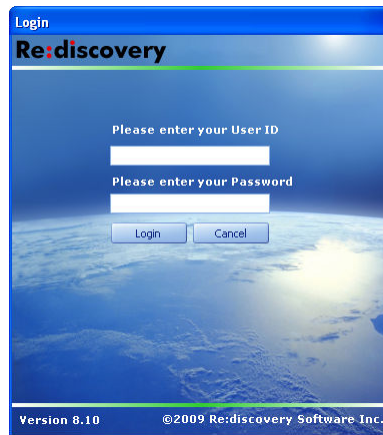
- An MS-DOS window will open briefly as it registers dll files. It will close automatically.



- The workstation upgrade is complete. Click OK.



- Click [Close] on the installation menu.



- The login window opens. Use your usual ANCS+ user ID and password to log in to ICMS. Your computer's desktop will have a new shortcut for "Rediscovery ICMS." The same option will also be found from the Windows Start button under All Programs. Your previous shortcut for "Rediscovery Version8.0" will be inactive.

## J. Installing SQL Server 2005 Express Separately

### 1. *Why would I need to install SQL Server 2005 Express separately?*

When using the March 2009 ICMS installation disk, you may need to install SQL Server 2005 Express separately because:

- you are installing on a 64-bit server, or
- you must provide an alternate SQL password.

Use these instructions to install SQL Server 2005 Express edition manually for **ICMS**. SQL Express is used for ICMS at most DOI & NPS units with small to large databases and 5 or fewer concurrent users. The March 2009 installation of ICMS is a 32-bit application, which can be installed on a 64-bit server and run from 32-bit workstations. Future updates will make it fully compatible with 64-bit operating systems.

### 2. *What do I need to install SQL Server 2005 Express?*

Depending on whether you have a 32-bit or 64-bit computer, choose one of the following options:

- **For 64-bit computers**, download the 64-bit version of SQL Server 2005 Express at:  
<http://www.microsoft.com/downloads/details.aspx?familyid=31711D5D-725C-4AFA-9D65-E4465CDFF1E7&displaylang=en>  
 Download the file: SQLEXPRESS.EXE.

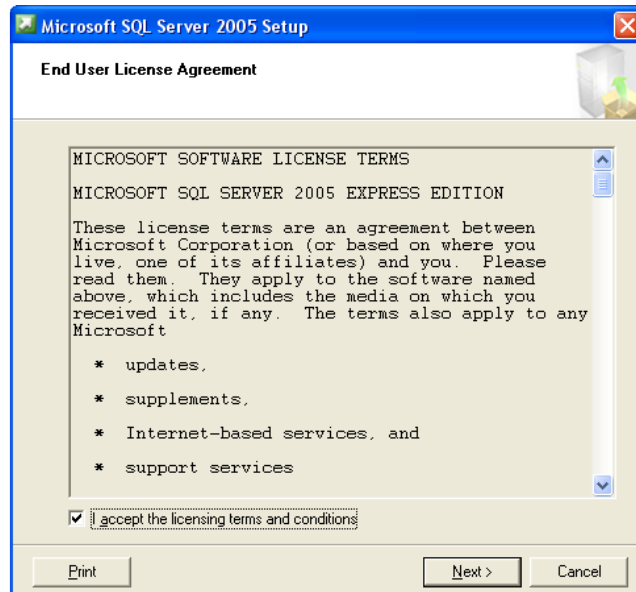
Launch that file and follow the steps shown below.

- **For 32-bit computers**, view the contents of the ICMS installation disk. In the folder "Proficio SQL Express\SqlExpress," launch the file "setup.exe" and follow the steps shown below.

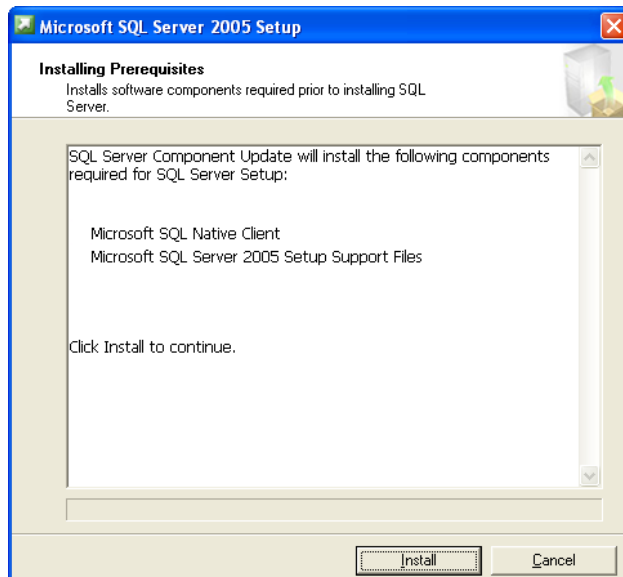
### 3. *How do I install SQL Server 2005 Express?*

After launching one of the installation files above, follow these steps to install SQL Server 2005 Express.

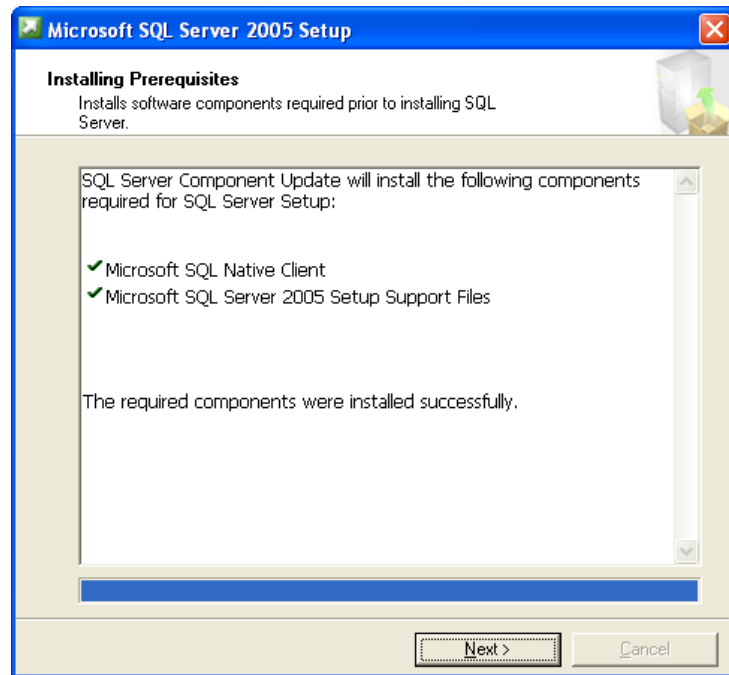
- The Microsoft SQL Server 2005 Setup window opens



- Accept the terms, and click Next.



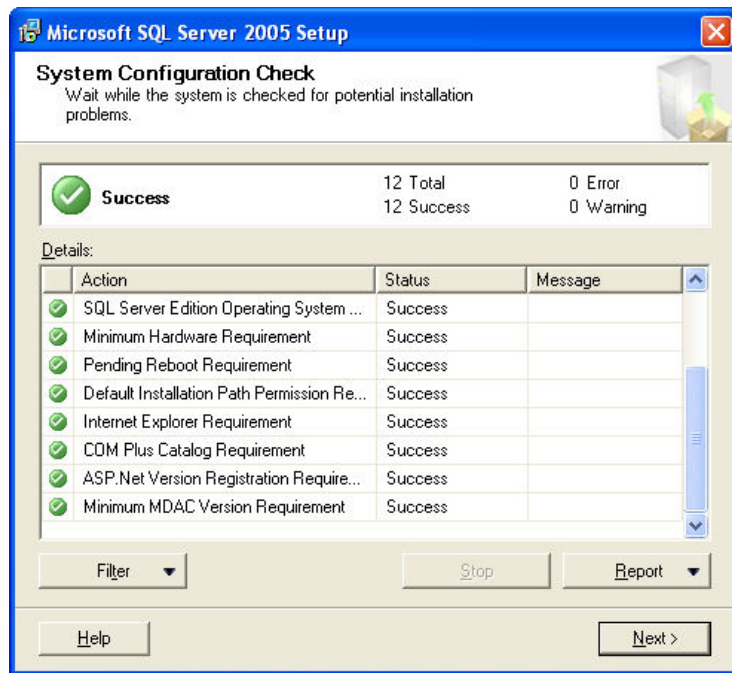
- Click Install



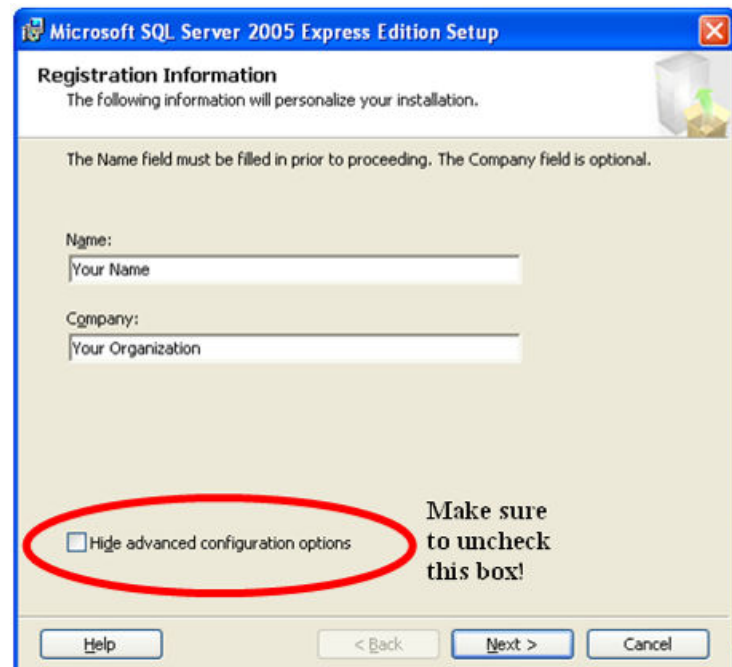
- Click Next.



- Click Next.

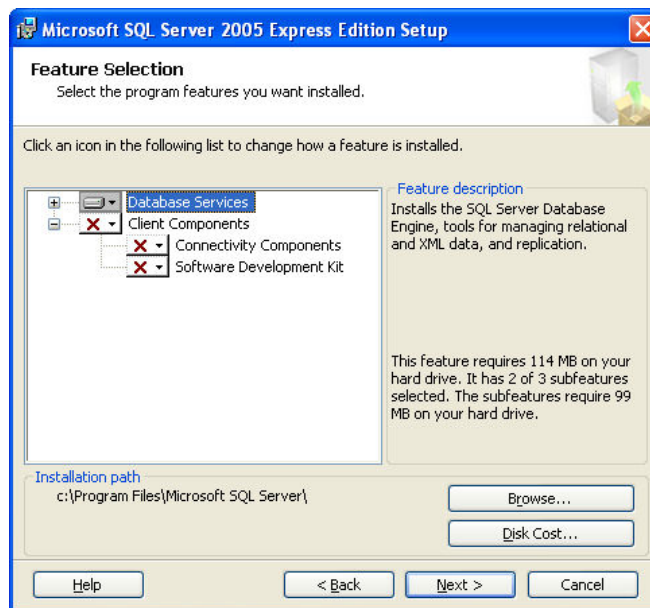


- Wait while the installation performs a system check. Then click Next.

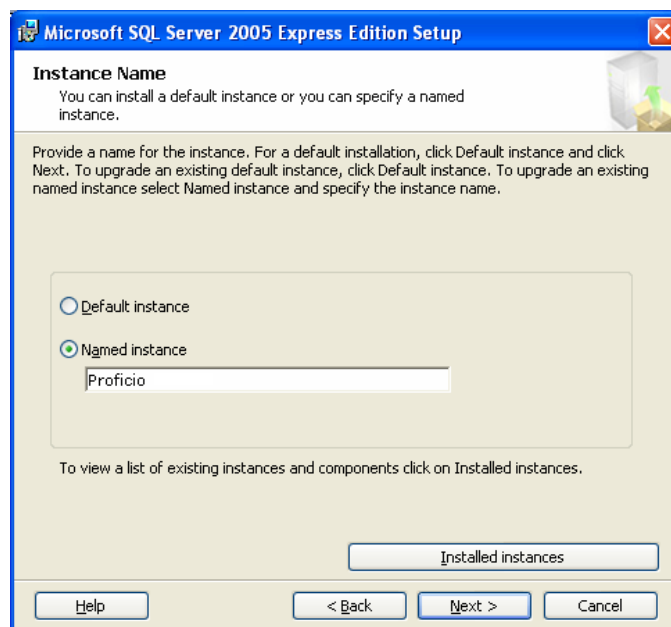


- Enter your name & organization. **Uncheck the “Hide advanced configuration options” checkbox.** Click Next.

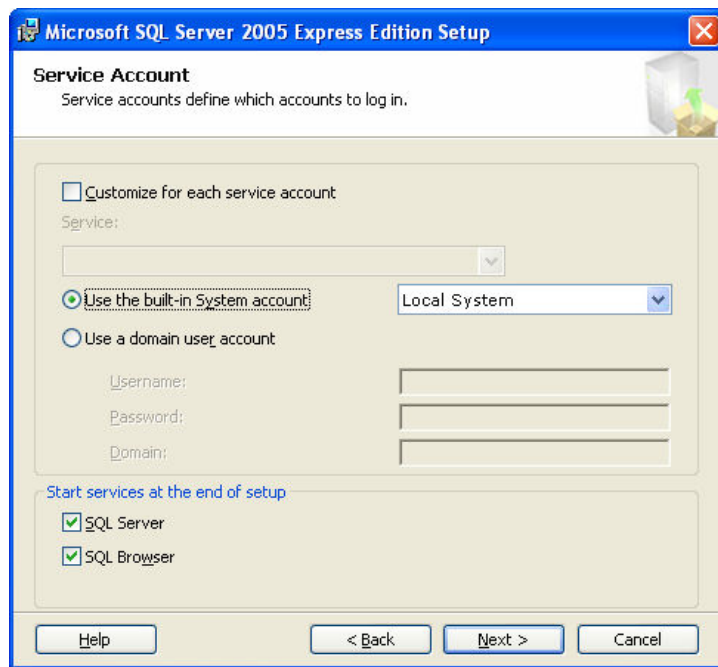




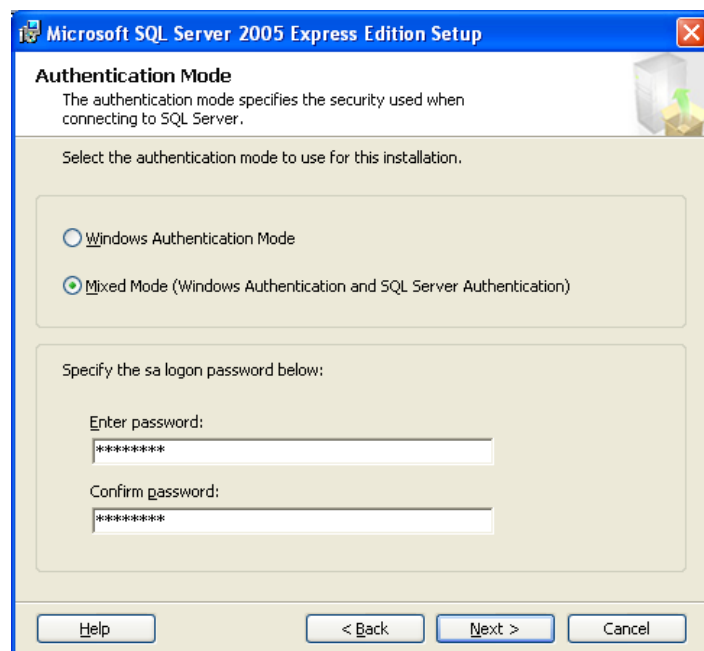
- Click Next.



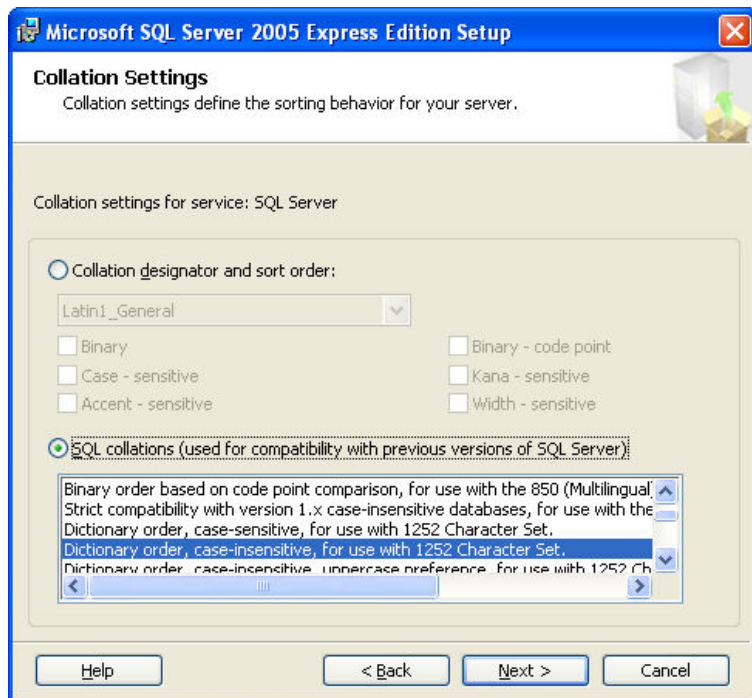
- Choose Named Instance. Enter “**Proficio**”. Click Next.



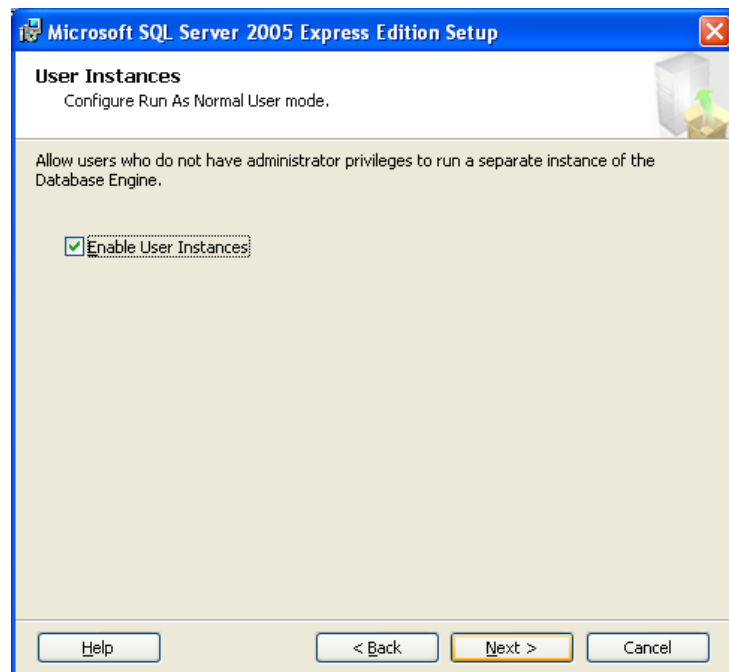
- Choose “Local System” instead of Network Service. Make sure that both SQL Server and SQL Browser are checked. Click Next.



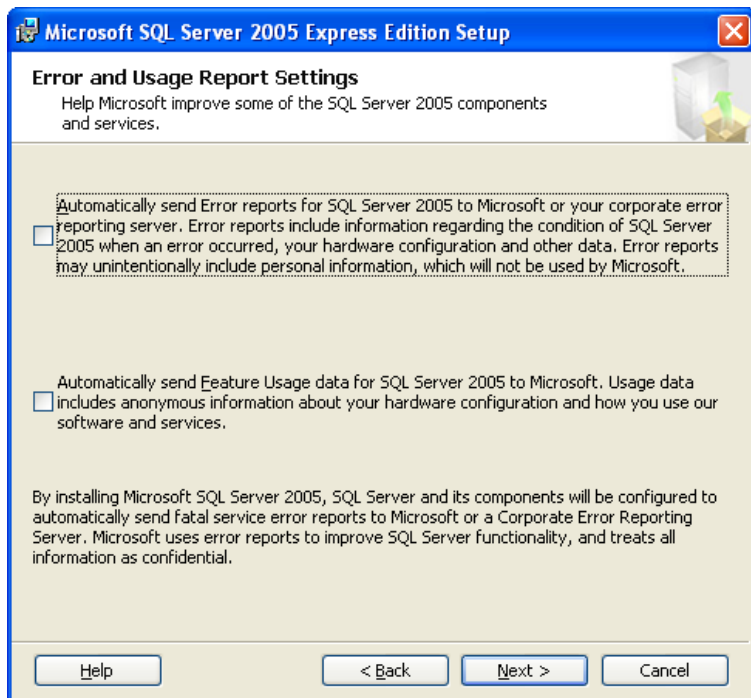
- Choose Mixed Mode.
- Enter the password **RSI#1988!icms@ad2009** or your own password, and re-type it to confirm the password. Click Next. **If you use your own password, make a note of it.**



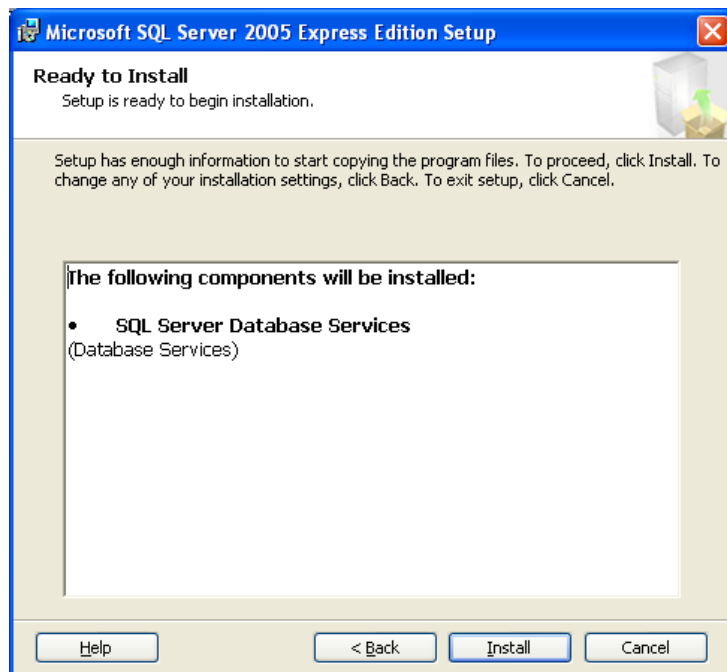
- Click Next.



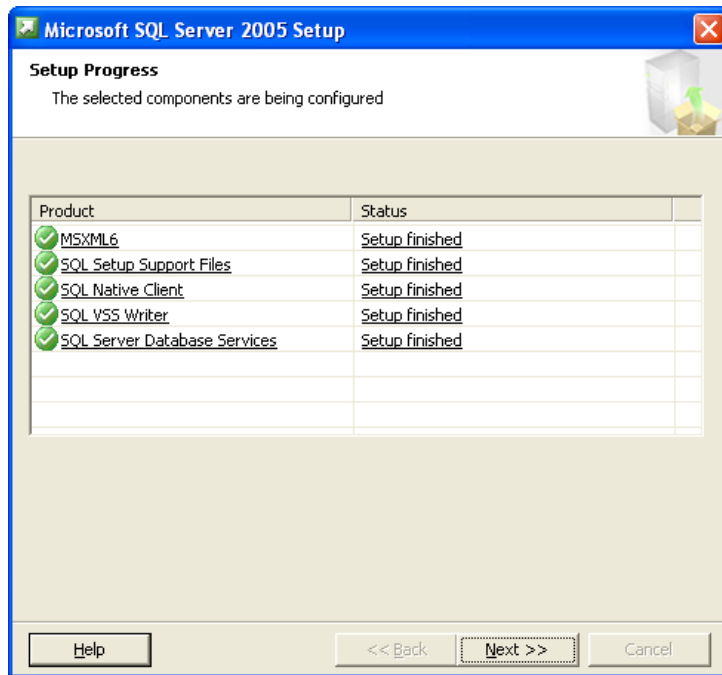
- Click Next. [Note: For Vista or Windows Server 2008 operating systems, put a check in the extra box to make the user an Administrator, then click Next.]



- Do not select either reporting option. Click Next.



- Click Install.



- Wait while the program is installed. This may take several minutes. Click Next.



- Click Finish.

SQL Express for ICMS is now installed.

4. *What else do I need to install before installing ICMS?*

In addition to the SQL Express that you just installed, you must also install the SQL Server Management Studio Express to complete the SQL and network configuration steps in Section E and Section F above.

Depending on your operating system, choose one of the options below:

- **For 64-bit computers**, download the 64-bit version of SQL Server Management Studio Express at:  
<http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&displaylang=en>  
Download the file: SQLServer2005\_SSMSEE\_x64.msi.  
Launch that file to install the SQL Server 2005 Management Studio Express.
- **For 32-bit computers**, view the contents of the ICMS installation disk.  
In the folder “SQL Management Tool,” launch the file  
“SQLServer2005\_SSMSEE.msi” to install the SQL Server Management Studio Express.

Follow the on screen instructions for installing SQL Server Management Studio Express. You can accept all the default installation options during this installation.

5. *What do I do after installing SQL Server 2005 Express separately?*

Now that SQL Server Express and SQL Server Management Studio are installed, you can proceed to install **ICMS**.

Continue with the installation instructions in Section E above. Follow those instructions to configure the SQL login, establish sharing and permissions, and install **ICMS**. You must also complete the network configuration in Section F (especially F.2) above.

**Note:** You will be using the option to “Install ICMS to use Full SQL Server” even though ICMS will actually be using the SQL Express instance you’ve just installed.

## K. Uninstalling ICMS

### 6. How do I uninstall **ICMS**?

Depending on the installation you have, follow the uninstall instructions for that installation type. There are three types of uninstall instructions:

- SQL Server Express Uninstall
- SQL Server 2005 Standard Edition Component Uninstall
- Workstation Uninstall

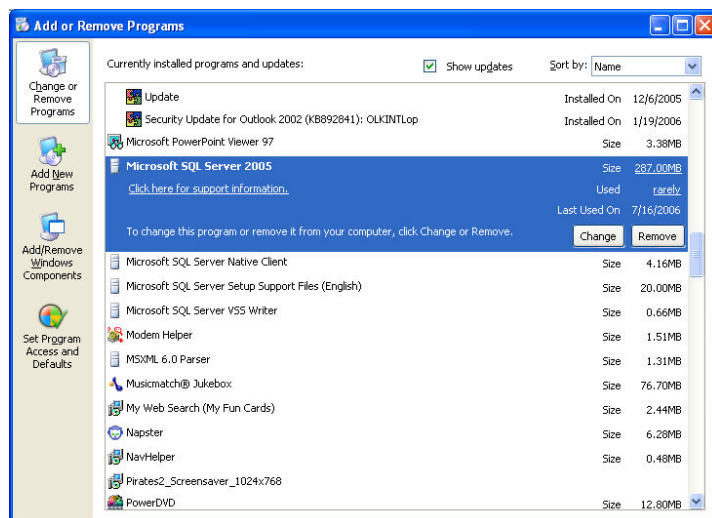
**Note:** Most units will have the first type of installation (SQL Server Express). A few will have the second and third type.

### 7. How do I uninstall the SQL Server Express installation of **ICMS**?

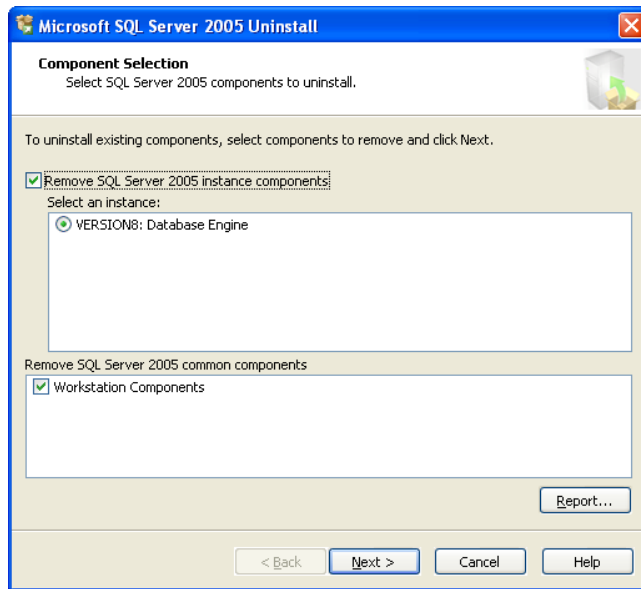
**Warning. If you uninstall the SQL Server Express installation, your catalog data will also be deleted. Make sure that you have a backup of your data before proceeding with the uninstall.**

To uninstall SQL Server Express installation of **ICMS**, you must first uninstall the SQL Server Express before you can uninstall **ICMS**.

- Click on Start on the Windows Task Bar and choose Control Panel.
- Then choose Add/Remove Programs. Wait while the list of programs is built.
- In the programs list, you will be uninstalling these components in this order:
  - Microsoft SQL Server 2005
  - Microsoft SQL Server Native Client
  - Microsoft SQL Server Setup Support Files (English)
  - Microsoft SQL Server VSS Writer
  - Rediscovery Proficio SQL (or Rediscovery Version8.0)
  - Rediscovery Proficio Workstation (or Rediscovery ICMS Workstation)



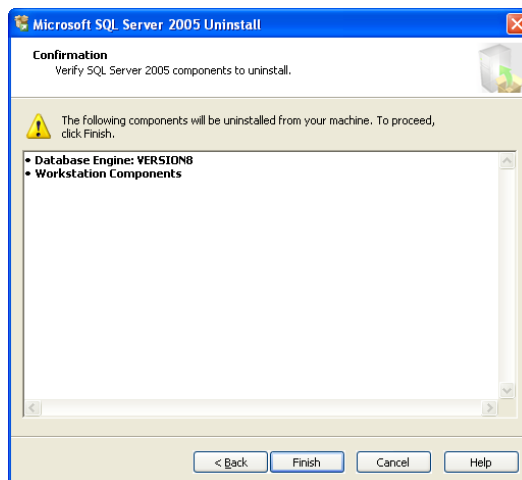
- First, select Microsoft SQL Server 2005 and click Remove.



- In the Component Selection window, select the PROFICIO: Database Engine (or VERSION8: Database Engine) instance and check the Workstation Components.

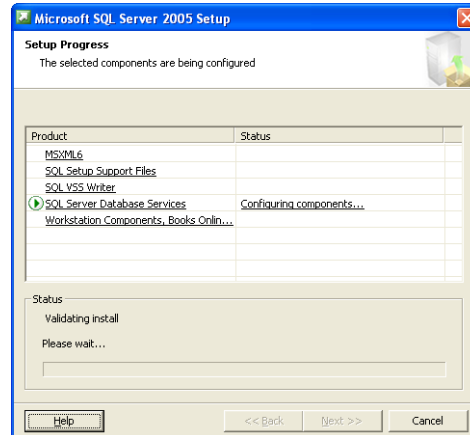
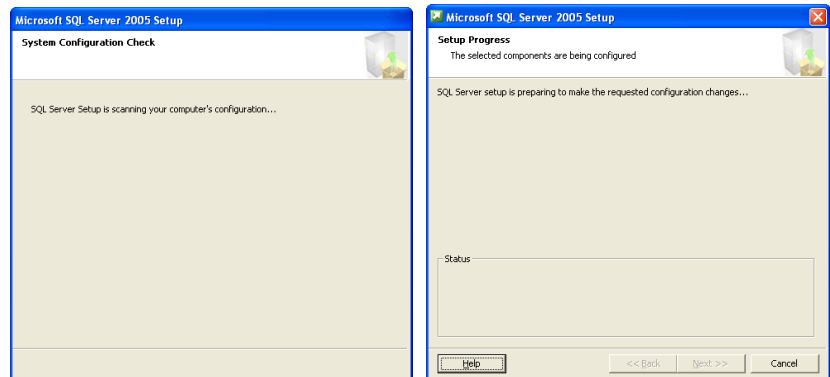
***WARNING: If you have any other SQL applications installed, do not check the Workstation Components option or the other applications will be removed also.***

- Click Next.



- To confirm uninstalling these SQL server components, click Finish.  
**Note:** If you did not select the Workstation Components in the previous window, it will not appear in this list.
- You will see the following screens while the setup prepares to uninstall.

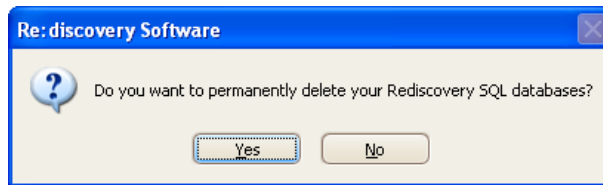




- Wait while the components are being uninstalled. The window will close automatically when finished.
- Back in the Add/Remove programs list, select the Microsoft SQL Server Native Client and click Remove. It will be deleted immediately.
- The other Microsoft SQL Server components will automatically be removed from the program list. You may have to press F5 to refresh the list.
- Next, you will remove the Rediscovery Proficio SQL (or Rediscovery Version8.0) program. **Note:** Do not manually remove the Rediscovery Proficio SQL (or Rediscovery Version8.0) folder without going through the uninstall process. Doing so will create errors and the program will be unable to uninstall properly.

***WARNING: If this is a standalone installation, removing this program will also delete all databases which include your catalog data. These are not retrievable once deleted.***

- In the Add/Remove Programs window, select Rediscovery Proficio SQL 8.10 or Rediscovery Version8.0 and click Remove.



- If you are sure you want to delete your Rediscovery SQL databases, click Yes. The program will be removed along with the databases.

**Note:** You may get a message that the program was unable to delete the Query Express folder. Click OK. The majority of the program files will be deleted. You will have to manually delete the C:\Program Files\Rediscovery Software Inc\Rediscovery Proficio SQL (or Rediscovery Version8.0) folder.

- Next, you will remove the Rediscovery Proficio Workstation 8.10 (or Rediscovery ICMS Workstation) program. In the Add/Remove programs list, select Rediscovery Proficio Workstation 8.10 or Rediscovery ICMS Workstation and click Remove.

You may also wish to remove the Rediscovery Version8.0 Prerequisites through Add/Remove Programs and then delete the entire C:\Program Files\Rediscovery Software Inc folder.

#### 8. *How do I uninstall the SQL Server 2005 Standard Edition Component installation of ICMS?*

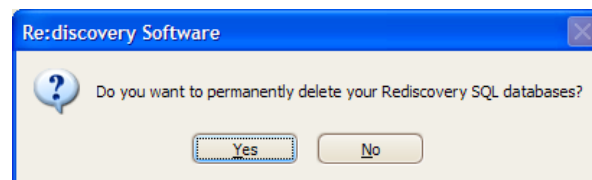
To uninstall the SQL Server 2005 Standard Edition Component installation, go to the Windows Control Panel and choose Add/Remove Programs. In the programs list, uninstall these components in this order:

- Rediscovery Proficio SQL (or Rediscovery Version8.0 SQL)
- Rediscovery Proficio Workstation (or Rediscovery ICMS Workstation)

**Note:** Do not delete the Rediscovery Proficio SQL (or Rediscovery Version8.0 SQL) folder without going through the uninstall process. Doing so will create errors and the program will be unable to uninstall properly.

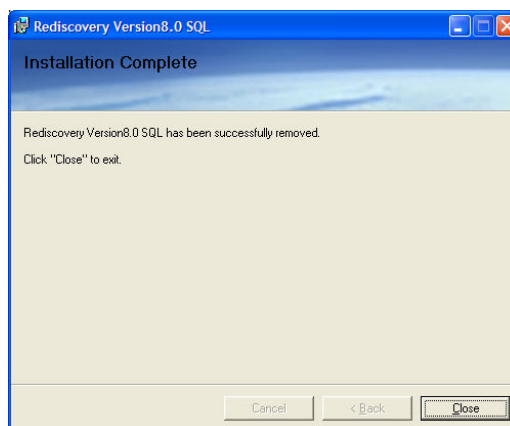
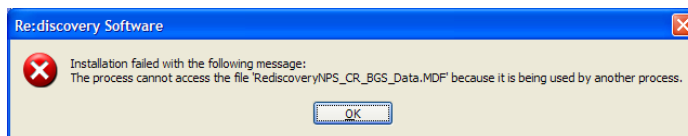
***WARNING: You should make a backup of your data directories before removing the program.***

- In the Add/Remove programs list, select Rediscovery Proficio SQL 8.10 (or Rediscovery Version8.0 SQL) and click Remove. The following message will open.



- Click No. You will have to delete the databases through SQL Server Management Studio.

**Note:** If you click Yes, you will get the following warning message that the databases could not be deleted. Click OK if you get this message and delete the databases through SQL Server Management Studio.



- You will get a confirmation message that the program has been removed successfully. Click Close.
- Next, you will remove the Rediscovery Proficio Workstation 8.10 (or Rediscovery ICMS Workstation). In the Add/Remove programs list, select Rediscovery Proficio Workstation 8.10 or Rediscovery ICMS Workstation and click Remove.

You may also wish to remove the Rediscovery Version8.0 Prerequisites through Add/Remove Programs and then delete the entire C:\Program Files\Rediscovery Software Inc folder.

#### 9. How do I uninstall the Workstation installation for ICMS?

Uninstall the workstation using Add/Remove programs.

**Warning:** If you have modified or created any new Rediscovery Reports from this workstation, they will be deleted when the workstation is uninstalled. Make a backup of these before removing the workstation. They are located in the C:\Program Files\Rediscovery Software Inc\VisualRediscovery\Reports folder.

To remove the workstation using Add/Remove programs:

- Click Start on the Windows Task Bar and choose Control Panel.
- Choose Add/Remove Programs.
- Scroll down the list of programs and select the Rediscovery Proficio Workstation 8.10 or Rediscovery ICMS Workstation program.
- Click Remove.

You may also wish to remove the Rediscovery Version8.0 Prerequisites through Add/Remove Programs and then delete the entire C:\Program Files\Rediscovery Software Inc folder.